ONLINE BUSINESS TRAINING MANUAL

ONLINE BUSINESSES, NOT WEBSITES™

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1. INTRODUCTION

Welcome! This manual has been designed to meet the needs of anyone seeking to build and manage an Online Business. The document will be split up into four main parts:

- **Internet Marketing and Strategies for Success**
  This section covers the basics in how to market your business online and what is important when building an online business. We'll also lay out some strategies you can use to foster your own ideas and grow your success, faster.

- **Getting Started with an Online Business**
  This section covers the basics you need to understand first, whether you are implementing the online business or managing it post-implementation.

- **Implementing an Online Business**
  This section is laid out as a tutorial for those implementing an online business. Parts can also be used as a reference for those managing their online business.

- **Further Aspects of an Online Business**
  This section covers some of the deeper functionalities of the system and shows how to implement them. This includes online shopping, email marketing, building communities and more.

1.1. Using this manual

The manual is laid out to accommodate the reader as both a training course and a reference manual. Sections can be read as "Modules", however the tutorial is best carried out as a hands on exercise.

As a reference manual, the reader can navigate the manual using the tabs on the side of the book. Each tab marks the section where a particular functional aspect of the solution is explained and help provided, allowing for quick navigation.

2. INTERNET MARKETING: ONLINE BUSINESS SUCCESS 101

2.1. Background: the Internet and Business

The internet has been a huge disruptive force in the business world. We've seen the birth of new business models enabled by the internet, and the face of marketing and "the media" has changed significantly.

Think about how the internet has grown and become a pervasive part of life. We've gone from bulletin boards, free email and an internet boom then bust. Now, blogs are the currency of authenticity and forums are the bedrock of online communities. More and more vital business transactions are taking place online as people purchase goods and services from people half a world away. We're seeing musicians in the charts that were discovered on MySpace, selling an album that they made in their garage!

The world truly has changed significantly in the last decade, and businesses need to adapt to take advantage and not be left behind. Here are some key points that are essential to understand:

- Millions of potential customers are primarily using **search engines** to find information about products or services to meet their needs. As such, there is an **information need** that must be fulfilled for any browser to become a buyer.
- The Internet is a **low-trust** environment – no one knows you are who you say you are. Building trust and confidence is essential.
- Your **goals** must be clearly defined, and you web presence built with those goals in mind to guide your potential customers where you want them to go.
- The Internet makes it easy to find a cheaper or better deal. **Building loyalty** and managing your customer's experience with you is more important than ever.
- Having a successful online business isn't magic, and there is **no quick path to riches**. It requires hard work, but **there is a process** you can follow that helps!

So many people don't understand the above. That's why a vast, overwhelming majority of web sites fail – some sources suggest over **95% of small business web sites are a failure** in terms of delivering a return on investment. This is because most business owners don't know how and haven't been educated on how to make the internet a successful part of their business.

2.2. *The 4Cs – A Process for Success*

The 4Cs is a process developed to help business owners understand how to make the web an effective, revenue generating channel for their business. It's about making an online business successful. The 4C's are:

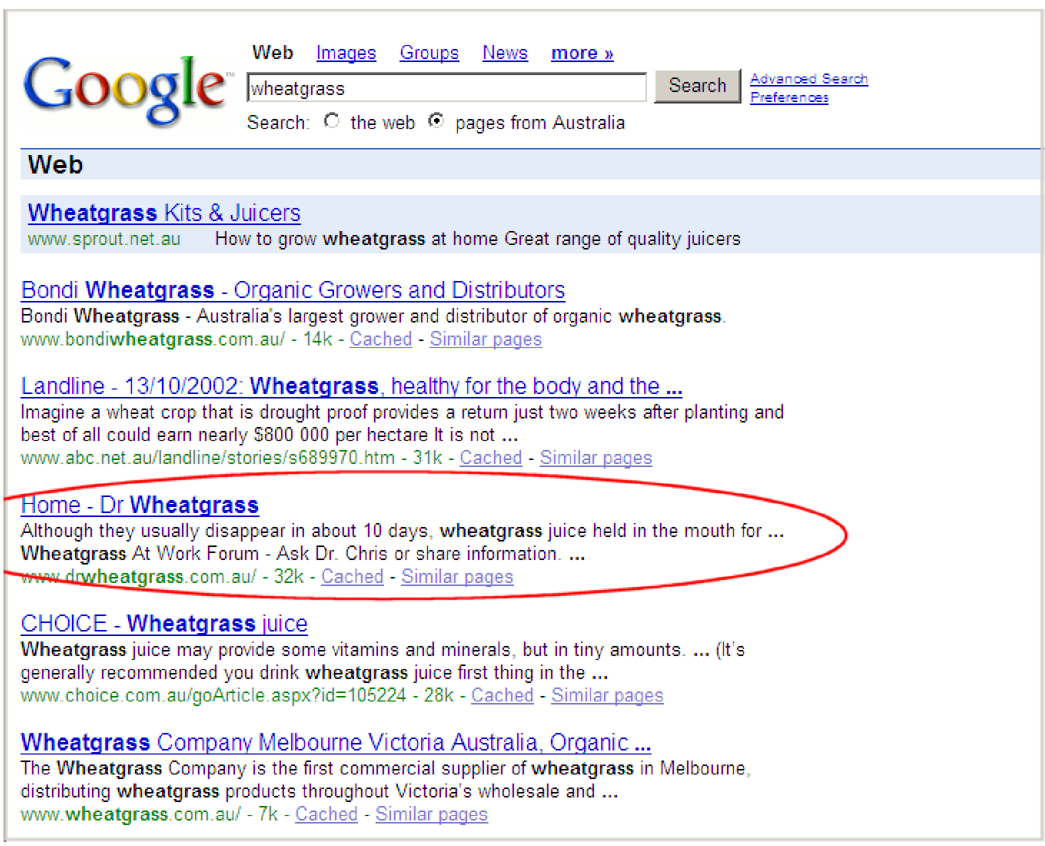
- Content
- Credibility
- Conversion
- Customer

Content

On the Internet, your potential customers are searching for information, and they are using search engines to find information that meets their needs. Search engines give greater weighting to targeted, valuable content. So if you want your business to be towards the top of the search results, you need to have valuable content on your chosen topic. That means when designing your site:

Focus on the information need of your visitors, not on making the sale.

An example of this can be seen when searching for "Wheatgrass" on Google.



Dr Wheatgrass is number four on the list. How did he get there – by having a wide range of varied and useful content on the topic of wheatgrass.

It also happens that Dr Wheatgrass successfully sells wheatgrass products, but he **focused on the information need of his visitors, not making the sale.**

Credibility

The net is a low trust environment. That means that potential customers will ask themselves many questions as they browse your site to convince themselves that they can trust you. As such you need to build credibility in the customers' eyes. The sort of questions they will ask themselves might include:

- How do I know if this business really even exists?
- How long has this business been around, and will they still be here tomorrow?
- If I buy or contact this business, will my details be safe?
- Will I receive my purchases, or will the promises made by the business be held?
- What type of post-sales support will I receive after receiving the product?

So you need to address those questions, and design your web site to help foster trust and build your credibility. How can you do this?

1. Meet the information need first. Your potential customers came for information, so meet their needs in that department first.
2. Write about yourself – how long you've been in business, who you are and why you do what you do. Even put up a picture or two of your team.
3. Display Customer Testimonials – who else has used your product or service, and how good was their experience.
4. Capture Customer Feedback – Give people a mechanism to contact you easily and provide feedback or ask questions.
5. Create a Community (e.g. Forums) – An extremely powerful credibility tool, as it often achieves points 1, 3 and 4 all at once. Plus you allow customers to talk to each other and spread the word first hand to new customers.
6. Write you business contact details such as phone numbers and addresses. If you have some sort of business registration number, include that somewhere too.

Conversion

Conversion is the art of turning an information seeker or browser into a customer. It's often hard work, but the first two Cs, Content and Credibility, go a long way to helping with conversion. The next thing you need to do is identify your conversion goals, and design you site around those goals.

Usually a site would have at least two goals. One is a primary goal – first prize. A primary goal is usually something that brings in money or has significant value to your business like:

- A sale on your online shop
- A booking for your seminar

The other goal, the secondary goal, is your second place prize, sometimes referred to as the backup goal. Secondary goals are usually a mechanism to give you another chance later at converting the browser to the primary goal. Secondary goals are things like:

- A "contact us" form
- An email newsletter subscription

How can you enhance your chances of conversion? The key things you can work on to improve conversion are:

- Identify and refine your "Conversion funnel". A Conversion funnel is the path you identify that begins where the customer is starting down the path to conversion, and ends after the conversion is made. A funnel needs to be designed to build comfort in the purchase, not be too many steps or be too complicated, but also not be too short. Funnels that are too short result in a "half-baked" customer who isn't sure if they want to buy yet!
- Use "Calls to Action". A call to action is something like "Buy now", "Click here", or "Get started today". You should include these both in your site to start users down the conversion funnel but also within the conversion funnel to drive them to action.
- Use the secondary goal to "catch" people who fall out of the primary conversion funnel. By placing the secondary goal strategically in the site, you can catch those potential customers who aren't 100% convinced.

Customer

Customer is the final C, and the most important. Why it that? It's because the cost of acquisition of a customer is higher than the cost of retention. For you to go out and go through the previous 3Cs and get a new customer is time consuming and requires effort – and money. So the 4th C is about how you can keep your customers happier and retain their business for as long as possible, as cost-effectively as possible. The key things to remember are:

- Customers are expensive to acquire.
- Customers can find your competitors online very easily.
- Customers online are impatient – they want service NOW.
- The Customer has the "high ground" because the Internet gives them greater power to choose and compare you with your competitors.

There are several key ways to increase your customers' retention rates, including:

- Run loyalty building advertising campaigns. Loyalty campaigns are targeted marketing campaigns that leverage your knowledge of your customer. An example of such a marketing campaign is a birthday campaign that goes out before my birthday to offer me a special deal: "Happy Birthday: Buy one T-shirt and get one free in your birthday month"
- Provide exemplary service with fast response times. When you receive a lead, enquiry or support request, react as quickly as possible. Better yet, you should be receiving emails and SMSs notifying you of customers' requests.
- Don't waste time – provide useful FAQs (Frequently Asked Questions) to allow your customers to find answers to their simpler questions without having to contact you.
- Build a relationship. Use the right tools to keep track of your correspondences with customers, and make sure you can share knowledge about your customers.

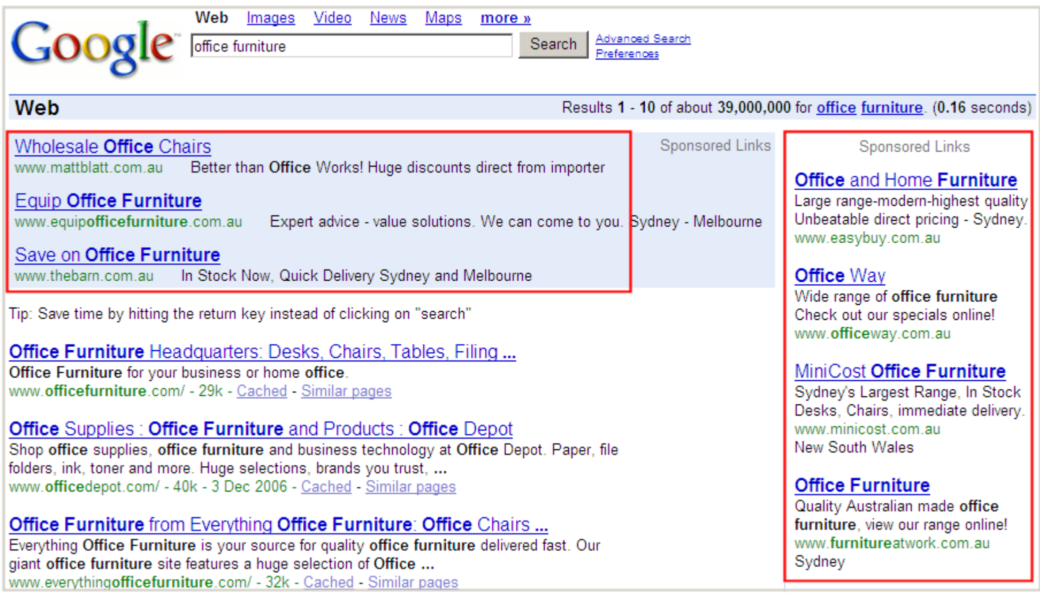
Each of the Cs works in concert with the others, linking together to create a winning process that helps you generate more leads and ultimately make more money out of your online business.

2.3. *Online Marketing Channels*

There are myriad ways to get your message out there on the web. Each one has benefits and costs associated with it, and they may vary in their degree of effectiveness.

Search Engine Marketing

Every minute, millions worldwide are searching for information online. Search engine marketing allows you to tap into those people who are searching for information about your services by targeting keywords they might use. Relevant advertisements then appear next to the "organic" (or non-paid) search results.



If we are selling office furniture, I might think the keyword combination "desk chair" would be relevant for my business. I can then "bid" on that keyword combination – the more I bid the more likely my advertisement will appear at the top of the search results.

What you are bidding for is how much you are willing to pay each time someone clicks on your ad to visit your site. This is called CPC or Cost-Per-Click. Cost for CPC advertising can range from a few cents to several dollars per click.

Search engine marketing is most effective when you target a niche. Keywords like "travel" is likely to be very expensive to bid on – a lot of big companies are willing to spend big on capturing holiday maker's money! But if you target a niche market, your keywords are cheaper and you are also targeting your market more clearly.

A good example might be if we were selling cutlery and knives. While we could bid on "knife" and "fork", we could be in trouble – those keywords aren't targeted enough for our market. The best results would come from a larger number, or groups of targeted keywords that could include "collector edition teaspoons" and "japanese forged knives". By targeting our ads more carefully, we're helping to

- Increase conversion rates – your ad is offering something closer to what the searcher actually wants
- Decrease acquisition costs – the keywords are cheaper
- Get noticed by the people that matter – search terms are more likely to align with what the searcher is after, and so they are more likely to click on your ad

Affiliate Marketing

Affiliate marketing is a way in which you can grow your sales force by recruiting people outside your company. These people could be good customers or just other website or business owners who have an audience that might be interested in what you offer.

Affiliate programs work by you giving a special URL to the Affiliate that they use to link to your site. You then use technology such as the Affiliate Program tool to track the people that an affiliate sends your way. The affiliate would usually receive compensation from you for each lead they send you – either a standard cost per referral or a commission on any thing that the referral spends.

Social Marketing and Online Communities

Social Marketing is a newer concept in online marketing which involves leveraging or creating social networks to help spread your message. Networking and sharing sites like Friendster, MySpace, Flickr and YouTube can be a part of your online marketing, especially if you are targeting a younger audience. Many marketing professionals are using YouTube to try to ignite a “viral” phenomenon for their product, whereby people share a promotional video with their friends and the message spreads that way.

Forums are a powerful tool to help you build your own community. Forums allow its users to share ideas and discuss their opinions on various topics. By building a community with forums around your online business you can:

- Increase your credibility. A community of users around your business is obvious evidence that your business is legitimate and has real customers
- Help your customers spread the word about your business. When customers come to your web site, they can see what your community says about you and how good you really are.

Another way to provide fresh, valuable content that boosts your credibility is to write articles regularly via a Blog. Blogs, or Weblogs are written like a diary and often express the personal opinions of the writer. As a business owner, blogging is a great way to add a personal touch to your online business. It is also a way to grow a community, or a social network, around the concepts important to your business. So you can attract an interested audience and spread your message via trackbacks and links into other bloggers' blogs.

Many businesses online are starting to catch on to another technology that is growing in prominence: RSS. RSS stand for Really Simple Syndication, and allows you to syndicate almost any type of content – which means that the content can be reproduced easily elsewhere on the web. RSS works by allowing your customers to subscribe to "feeds" of your content. Your feeds could include blog posts, news announcements or other content. When new content is added, the customer is immediately notified. This means that your content is easier to share among your community, and that it's easier than ever for your customers to stay "in the loop" with your online business.

3. Strategies for Success

Strategies for success are a set of strategies that build and expand upon the 4Cs process in a structured, goal oriented manner. They can be used either individually or together, which is why many of the strategies overlap and reinforce each other.

3.1. Be In Control

Being in control of your online business is ultimately about two things:

- Managing your content; and
- Analyzing and improving on your efforts

Both are essential and basic ingredients to your online success. It is essential that you are able to do this yourself regardless of whether you are technically savvy or technology is the last thing on your mind.

Be In Control of your Content

Being in control of your content is about keeping your site fresh and current, in a way that helps you keep your customers happy. In fact it's been proven that a customer will make contact with your business several times before doing business with you. One of the most common forms of contact is visiting your web site, and you can give them a reason to keep coming back to your site by providing valuable, fresh content. A site that customers come back to often is called "sticky". Updating your site often is the most basic way to make your site sticky.

Easy ways to Improve Stickiness

- Update your home page welcome text regularly.
- Modify other pages by adding and rotating attractive/useful images.
- Have regularly updated news or announcements on your site.

Stickiness is a concept to keep in mind all the time – ask yourself: "How can I make my web site stickier?"

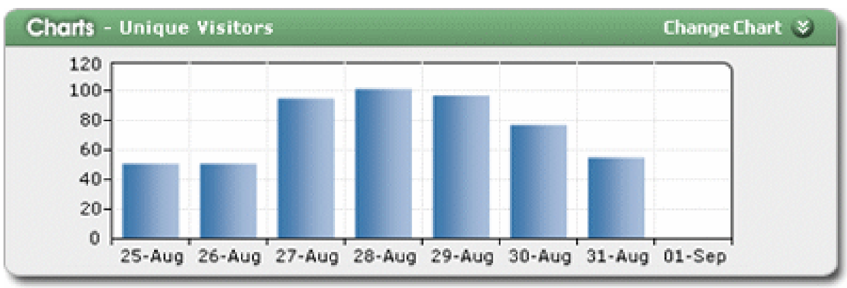
Remember, a sticky site is a great step towards building a successful online business.

Analyzing and Improving Your Business

As a business owner, it is important for you to closely analyze your performance regularly. Your online business should not just sit there and stagnate - while you are improving and adding new content, releasing news items and more, you also need to watch your performance carefully and make corrections to the course to stay on track.

Statistics to watch out for include:

- Weekly/daily page impressions / hits
- Weekly/daily unique visitors
- Weekly/daily sales volume
- Newsletter subscription and unsubscription rates
- Newest customers
- Hottest products
- Your biggest spending customers

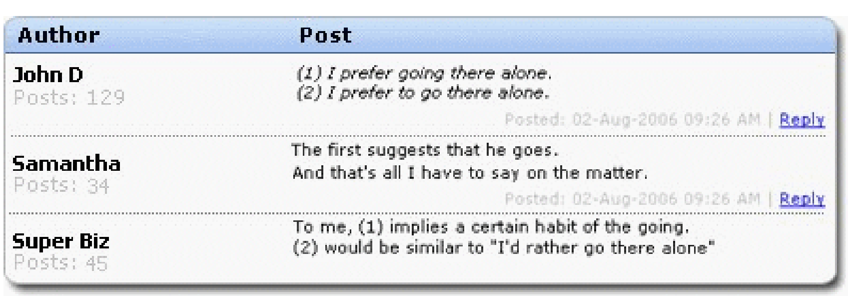


All of these can help you to evaluate how your business is doing, and help you understand how your current marketing efforts are playing out.

3.2. Generate New Leads

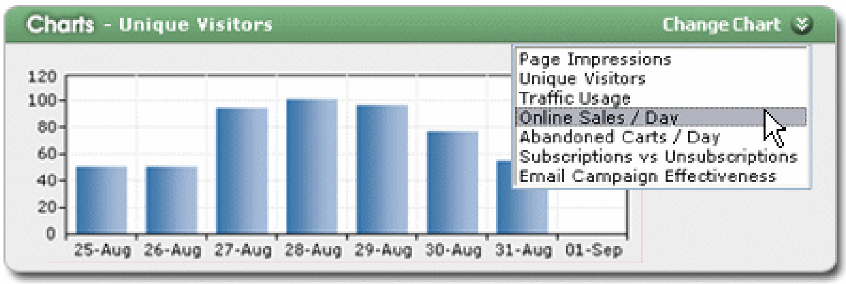
Go Grassroots

Your current customers are you greatest asset and best ally. They are also your best sales force – and they are free. Capitalize on their goodwill and positive experiences from dealing with your business, and give them an avenue to interact with one another – such as Forums. By building a community around your online business, you enable your existing customers to help you find new customers – and give them the tools to evangelize your products and services.



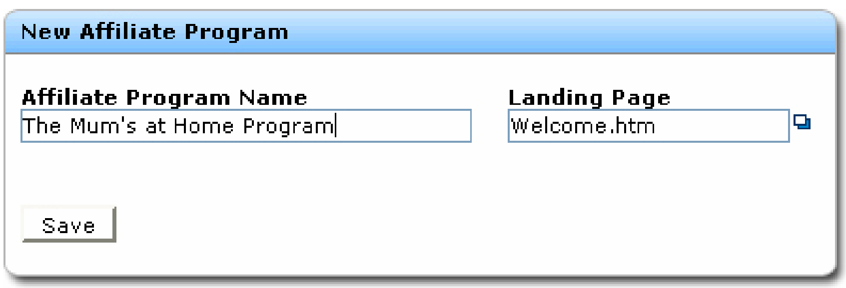
Use Google and Yahoo to Generate Leads

Some call it "The Google paradigm" – the huge trend for people to look for information on products and services via Google, Yahoo and other search engines, *first,* before traditional avenues such as the phonebook. You need to help them find you and your services, optimizing your site for search terms that relate to your business. You can even undertake pay per click advertising on search terms. Most importantly, you need to track and measure to improve your sales and conversion rates.



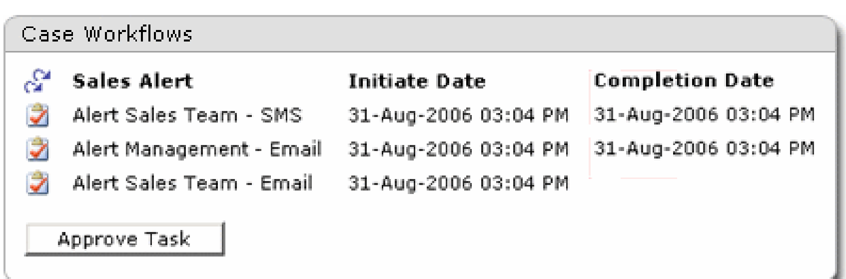
Grow your Sales Network

Your sales network shouldn't consist of just your own employees! You can get others to help you by developing attractive affiliate programs, which give your affiliates payment or commissions on their referrals and referral sales.



React In Real Time

Generating leads is essential – but following up and converting them is essential. Without conversion, millions of leads are worth a total of $0 to your business. When your leads make themselves known via a web form or online enquiry, you should be capturing their details and following up as quickly as possible to close the deal.



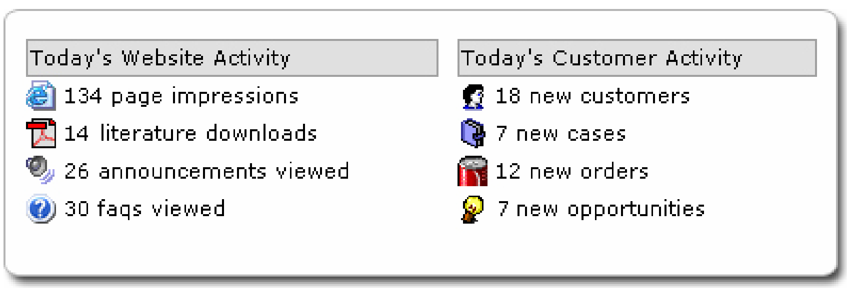
3.3. Have your fingers on the pulse

React Instantly - Get Notified

Every time a customer enquires, it is important to know about the enquiry and act on it as quickly as possible. You should be seeing enquiries as they come in via SMS or email. Imagine you (or your team) getting back to a potential customer while they are still surfing your website! That sort of responsiveness - being on the pulse constantly - earns customer respect and improves close-rates.

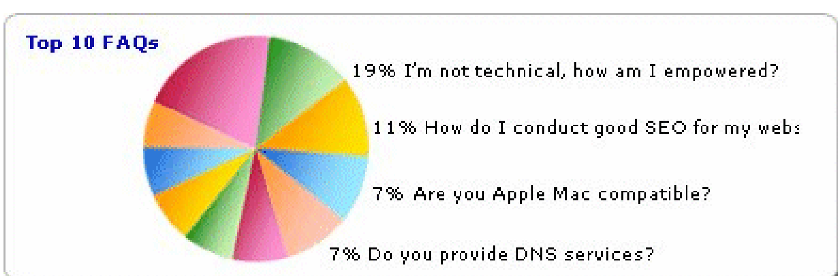
Instant Oversight - Be in the Loop

In years gone by, we'd have to climb a tree or walk up a hill to take a look at the lay of the land. That sort of oversight is essential in two ways - you need to know if you are going in the right direction, and you need to know what might happen in the near future. Every day, you need to climb that tree and have a look around!



Run Reports

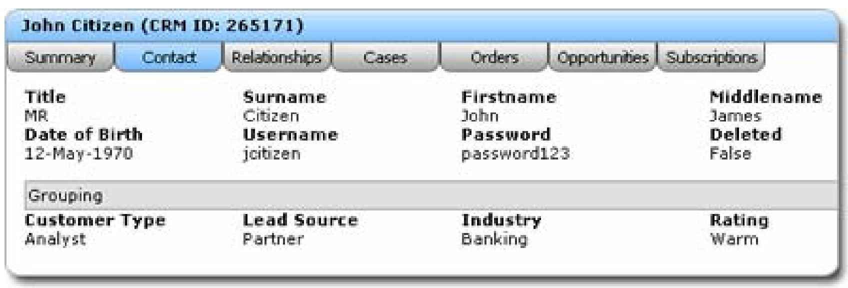
Running reports let you measure how you are going. Are you on track? What are you really achieving? Running reports regularly is integral to being in touch with your business. You can't know what your pulse rate is without measuring it!



Integrate, Integrate, Integrate!

Segmented and out-of-sync data is the death-knell of many online businesses. The quickest way to success in anything is to make those things that need to be habitual very easy. Keeping your customer database in one central place is one less tedious task you need to do - no need to synchronize multiple databases.

The other (often unseen) benefit of true integration is simply better understanding. Understanding your market is essential – for both your potential customers and existing ones. While it is possible to build a good picture of customers by looking across multiple databases, the most clarity comes from being able to see it all in one place. Purchases, notes your sales people have made, enquiries and web form submissions, email campaigns viewed and their reaction... All these things build a more accurate picture of your customer. Having this understanding puts you right in touch with your customers - the people who give your business a reason to be.



3.4. Amplify your voice

Beat the Drum

Every small business online can benefit from a blog. A blog (aka WebLog) is like a diary that you write in regularly. A business blog should be a focused platform to deliver your manifesto or business message to your audience. It should be designed to attract and interest the sort of people you believe make the best customers. Here's some tips to get your blog going:

- Write at least once a week
- Don't write something that has no value to your audience. Keep it focused.
- Register your blog on sites like Technorati, who track your blog to help readers find you.
- Allow comments on your blog -make it a mini community! Also answer and respond to comments where possible.
- Use trackbacks. Trackbacks are a way to notify another blogger you are writing about one of their blog posts. A link to your blog will appear on theirs, which helps you gain exposure - but make sure the blogger's audience is similar to yours, and that your post is relevant to the discussion.

Blogs can be set up in your Online Business by going to the "Content", then "Tools" and finally "Blogs".

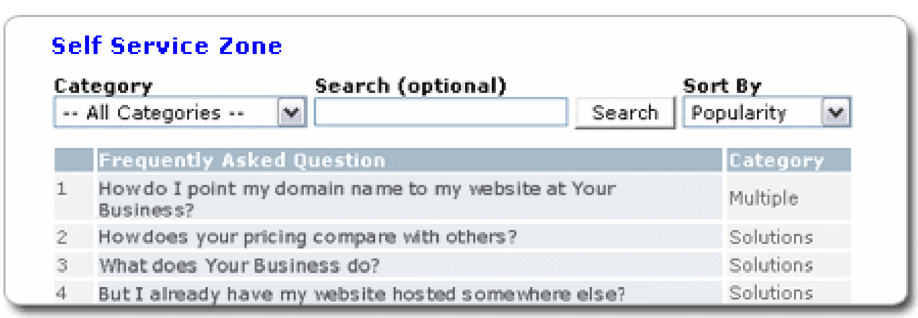
Tune Them In

RSS stands for Really Simple Syndication (or Rich Site Summary). What it does however is the powerful part - it allows customers to subscribe to your content (your blogs, announcements, web pages, FAQs and so on) via something called an RSS Feed. Customers can then read this feed on their customized Google home page, receive it in their email or through many other methods. RSS gives you a way to make it easy for your customers to stay in touch with you, when you content changes.

3.5. Be a Customer Service Guru

Don't Waste Time

Customer interaction is essential and it's often enjoyable. But no one running a business has enough time in the day to answer every single question - especially questions that get asked over and over! By providing an FAQ facility, you can significantly reduce your service costs, while doing your customers a favor. This is the sort of customer service feature which saves both you and your customers' valuable time, while improving the customer experience.

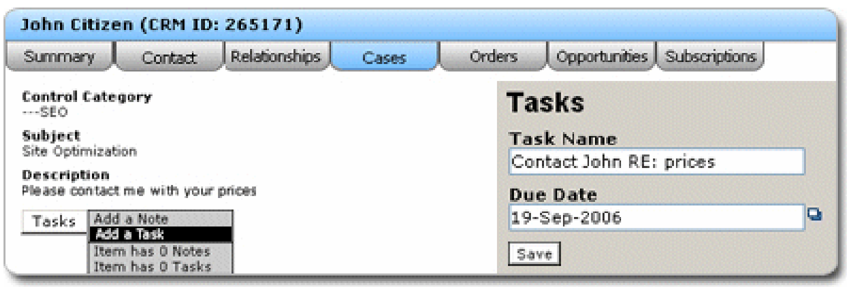


Be Responsive

Customers love responsive service. If you are a small business with limited resources, it can be hard to stay on top of the leads that are coming through your online business. By being instantly notified of a customer enquiry via SMS or email, you've got a chance to make a great first impression by getting back to them almost immediately after they inquire.

Build a Relationship

It's unpleasant when you're talking to a support or sales representative and you have to explain your situation over and over again. With all customer interactions, it's important to keep notes against your customer records, set tasks for yourself and centralize all that valuable data about your customer interactions - from past purchases to previous enquiries online. It comes back to our previous point on integration – your data should be easily manageable, and anyone in the organization should be able to pick up where the last guy left off. This will build stronger relationships and improve your 4th C, Customer.



Keep them Informed

Keeping customer's in the loop, especially when you are working on an ongoing project, is often a time consuming yet vital task. So you should set it up to allow your customers to log in to an account and view a history of their "cases" - which can be enquiries they've initiated, or cases you've created to indicate the start of a project. With your Online Business, you can do exactly this with a few clicks. It will save your customer's and yourself a bunch of time while still keeping them in the loop with how their project is tracking.

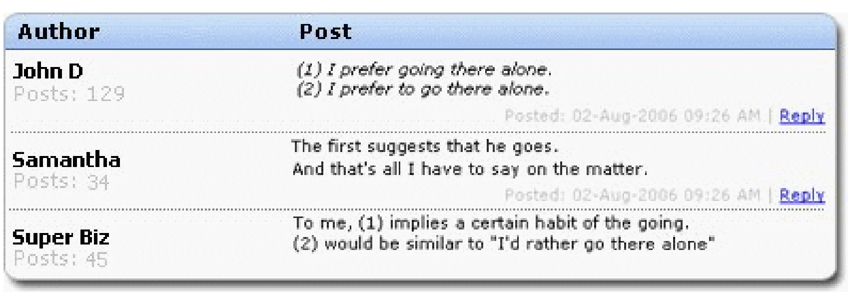
3.6. Build your Community

Be Heard

You know your customers best – what do they care about and what is important to them? Use that knowledge to get their attention and keep them listening by writing a valuable and focused Blog. Write with your unique voice to engage your audience on the issues that matter to them.

Start Conversations

Your customers are listening to your voice on your blog – now give them a place to continue their discussion, with each other. Forums are an essential part of online business building, as they allow customers and new leads to meet and discuss issues – all on your website.



Engage in a Dialogue

Allow your customers to express their opinion and start a dialog with you and each other. Create micro communities around your site's content. Allowing comments on your website and blog is a great way to create trust, increase transparency and build credibility.

Tie it all Together

A successful community building strategy shouldn't leave you in the dark in regards to what your customers are doing. Track your customer's behavior and activities, enabling more effective marketing.

3.7. Syndicate and Share

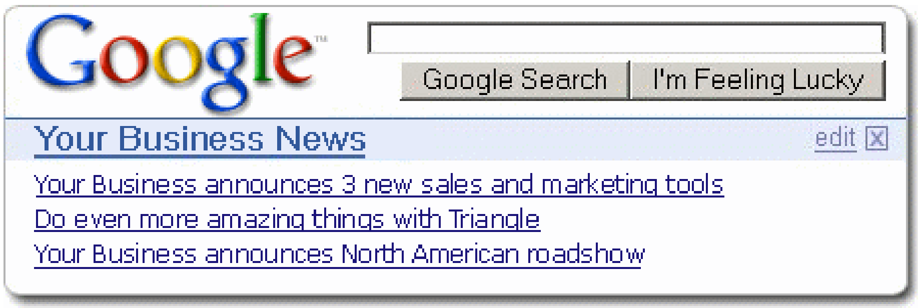
Syndicate and Multiply

Do you ever wish you could replicate yourself? Give yourself more coverage than one business could possibly generate alone? RSS (Really Simple Syndication) can help you do just that. With RSS you allow others to syndicate your content to other sources, based on an RSS Feed which updates when you update your content. That means that those around you who are syndicating your content - be it your blogs, announcements or latest job postings - get your updates and can then "pass it on" to their audience. The key thing is writing valuable enough content that people will want to syndicate it!

Share and Prosper

Make it easy to share your content around. People can subscribe to RSS feeds in their custom Google home page or receive updates in their email. And why would you want to do that?

Because you're giving your audience an easy way to stay in touch. Realistically, customers are unlikely to visit your site every day (if they do, you've made it - Good work!). RSS lets them tune in to you so that you only notify them when new content is added, meaning that they know exactly when they should be coming back to visit. RSS feeds are also indexed by a growing number of specialized search engines that people are using to stay at the bleeding edge of internet news, so it is yet another effective way to gain more exposure.



3.8. Sell stuff online

<u>Set up Shop</u>

Obviously the first step to selling online is setting up your shop! This isn't simply a matter of dumping your offline products into an online format - think first.

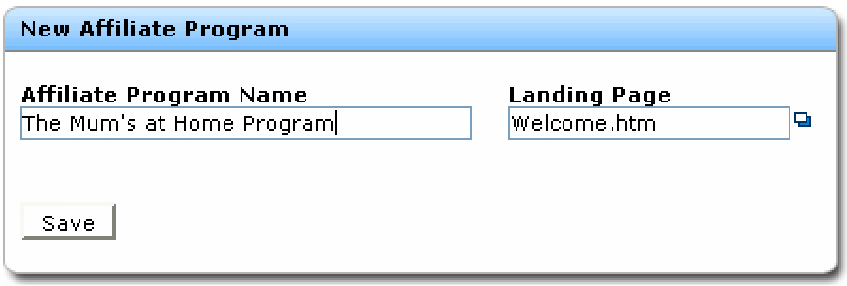
- **If people are using the web and finding you that way, what are they most likely looking for?** It probably isn't something common or easily found! Do you sell any unique products that are hard to find elsewhere, or do you have access to anything "niche" that your audience would appreciate, and they can't find easily on Amazon.com?

- **Can you sell your knowledge or intangible products?** Your Online Business allows you to sell electronic products online. Things such as MP3s, eBooks (PDF documents), software, can all be sold online and delivered via download. Many successful business coaches write books or record their thoughts in audio format. Can you take some of your experience or knowledge in your area of expertise and sell that to your online audience

So now you've identified some potentially un-thought-of items to sell online. Catalogues and Products are found in the "Content" menu of your Online Business - log in and get selling.

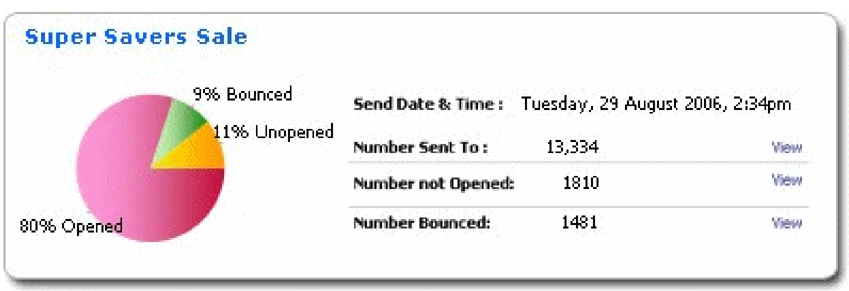
Help others Help you

You've likely heard of affiliate marketing - where others point their audience to your shop, saying something like "buy here, they're good!" So now you're getting more people your shop. Sounds good? Why would people help you out like that? Because you'll give them commissions on sales they've referred. Set up affiliate programs and help others help you.



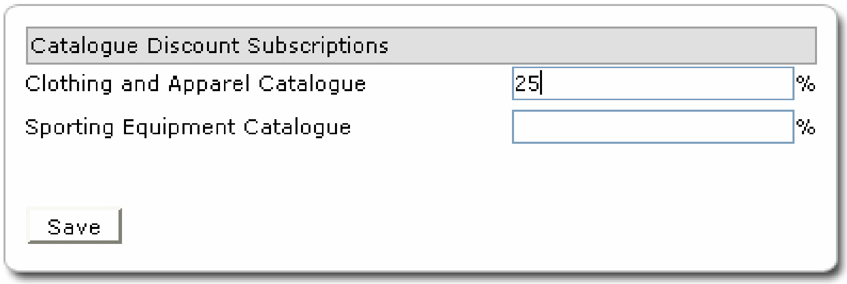
Drive Traffic

You've got great products that your target audience loves, and affiliates helping you to beat the drum. How else can you drive traffic? It may be old fashioned but consider putting on a sale! Few can resist a bargain. So this is where you can leverage your customer database to announce your sales. Set up a once-off campaign to announce your week long sales, pointing them to your "sale" catalogue, and watch the customers come flooding in.



Show Them Some Love

Your loyal customers are your business's bread and butter. With Your Online Business, you can give each individual customer discounts on their favorite catalogues. That way when they log in to your shop, they can get individualized pricing. How's that for some love - and it really builds loyalty too.



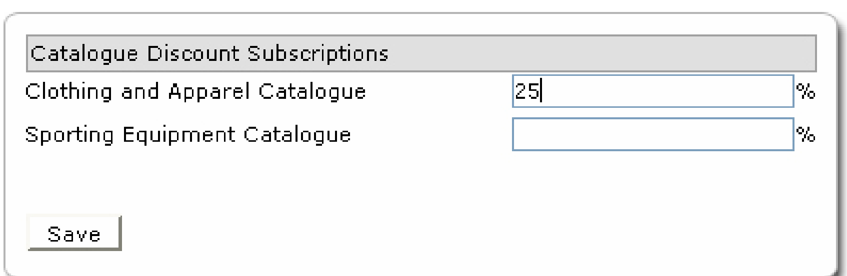
3.9. Build Customer Loyalty

Congratulate, Celebrate and Cajole

Your Online Business lets you record so much knowledge about your customers. Capitalize on that knowledge by sending them an email at personalized times that they care about! You can use our loyalty email marketing campaigns to send customers emails on their birthdays, or remind them to buy flowers for their wife's birthday. The system has 5 anniversaries you can set for each customer - use them to congratulate them on joining, celebrate or cajole them into buying.

Reward Loyalty

Reward loyalty by giving discounts on your customer's favorite catalogues. You could also individualize those discounts so that only your most valuable customer's can get the greatest level of discounts.



Don't Waste Their Time

Your customers' time is precious - don't waste it and don't waste yours. Centralize all your of customer data in one place to make it easy to find everything they've ever said or done while interacting with your business.

React To Feedback

You should be continually collecting feedback from your customers - on your forums, your blogs and your web forms. This level of interactivity gives customers a sense of confidence and importance. The only hard thing to take is serious criticism - but no matter what your customer's say, you have to listen to them, and either fix the problem or explain why it is the way it is.

3.10. Implementing Strategies for Success with Your Online Business

In this context, Site Goals are a measure of the strategy's success, and represent a business "win" if your customer completes the goal. These strategies are designed to drive customer to the listed primary and secondary goals. Some of the strategies operate at a slightly higher level, and so are not directly related to site goals.

Strategy	Primary Site Goal	Other Site Goals	Functionality	Refer
Be In Control	*no concrete site goal*	*no concrete site goal*	SiteWalk, Announcements, Reporting	8.9, 18.3, 8.10
Have your fingers on the pulse	*no concrete site goal*	*no concrete site goal*	Dashboard, Reporting, Customer Database, Web Forms, Workflows	5.4, 8.10, 7.7, 17, 7.6
Amplify your voice	Sign up customers to your lists	Get your customers to Subscribe to RSS feeds	Blogs, RSS Email Marketing,	11, 9, 10, 7.7
Be customer Service Guru	*no concrete site goal*	*no concrete site goal*	FAQs, Workflows, Customer Database, Cases, Secure Zones	18.2, 7.6, 7.7, 8.3, 11.1
Syndicate and Share	RSS Feed subscriptions	*none*	RSS	11.4
Sell Stuff Online	Online Shop Sales	Enquiry Web Form/ Email list subscription	eCommerce, Affiliates, Email marketing, Anniversaries	10, 8.7, 9, 21
Generate New Leads	Enquiry Web Form	Forum member sign up, newsletter subscriptions,	Forums, Reporting, Customer Database, Affiliate Marketing, Workflows	11, 8.10 7.6, 7.7, 8
Build Your Community	Forum member sign up	RSS subscriptions, leave comments	Blogs, Forums, Comments, Customer Database	11.2-11.5, 7.7
Build Customer Loyalty	Online Shop Sales	Web forms, Email list subscriptions	Email marketing loyalty campaigns, Individual discounts, FAQs, Comments	9, 8.7, 18.2

4. BUILDING AN ONLINE BUSINESS: PLANNING AND CONSTRUCTION CONCEPTS

4.1. *Identifying your goals*

After identifying the right strategy for you, your goals should be relatively clear. If not, consider this question - “What are you trying to achieve?” While “untold riches” would be a common answer, we need to be a little more specific. You should always identify the goals of your online business – the things you want your customers to do on your website - and then plan around them. Examples of workable goals include:

- A Newsletter signup
- An enquiry via a web form
- A sale via the shopping cart
- Register to join your community
- A download of a document or brochure

All of these goals have a specific value to your business. They also have differing technology requirements. Once you’ve identified you goals, you can move onto the next step – deciding what online business functionality your site needs.

4.2. *Online Business Functionality*

Based on the goals of your online business or on the strategy you’ve chosen, you can map out what functionality you’ll need to make your business work online. However there are some features which are nearly universally required. These are:

- Dynamic Menus – ability to manage your website’s navigation centrally
- Templates – keep your branding and corporate image consistent across all pages
- “Contact Us” web forms - react instantly to customer enquiries online
- Newsletter subscriptions – grow your customer database for marketing purposes
- FAQs and FAQ search

Other common but strategy-dependent features are:

- Announcements
- Online shopping
- Forums
- Blogs
- RSS
- Secure zones for member only areas

Identify the features you want to include and then create a list of all the functionality you require to achieve your goals and implement your strategy. Using this list, you can start drawing your sitemap.

4.3. Creating your Sitemap

A Sitemap is a list of all the web pages that will comprise your site. When planning your site, you should draw a Sitemap to get a clear picture of what pages you'll need to implement the functionality required for your online strategy. A Sitemap should always have:

- A Home page – a place to start!
- About us – build credibility with a little about you and your business
- Contact us – let your customers get in touch with you.

Beyond that, it's entirely up to you. Apart from your valuable content, you've got to figure out a place for the online business functionality you identified earlier. You can do this with a tool called an "Online Business Site Matrix". The site matrix is basically a sitemap, except it allows you to record desired business functionality against each page. It also allows you to specify common elements across all pages – these functions will appear on the site template. Below is an example of a simple Online Business Site Matrix.

Templates

Name	Features	Description
Site template	• Navigation Menus • Newsletter sign-up • Member log-in • Site search	Template to maintain consistent branding across all pages.
Secure page template	• Navigation Menus • Member log-out	Template for secure pages and other forms of secure content
Email template	None	Template to maintain consistent branding for all emails newsletter broadcasts.
Printer template	None	Minimalist template for use when printing out a page

Pages

Name	Secure?	Template	Features	Description
Home	N	Site template	• Latest 5 Announcements	Home page with our latest news and welcome message
About Us	N	Site template	• FAQ search	A page to describe our company, with searchable FAQs on our products and practices
Contact Us	N	Site template	• Enquiry Web form with Email or SMS notification	A page to allow the customer to submit an enquiry to us
Community	N	Site template	• Forums	Community page to hold our forums
Online Shop	N	Site template	• Catalogue list • Product search	Entry point to our online shop
Members Area	Y	Secure Template	• Literature items for download	Member only area to download VIP documents
Search Results	N	Site template	• Site Search results	Page to display search results

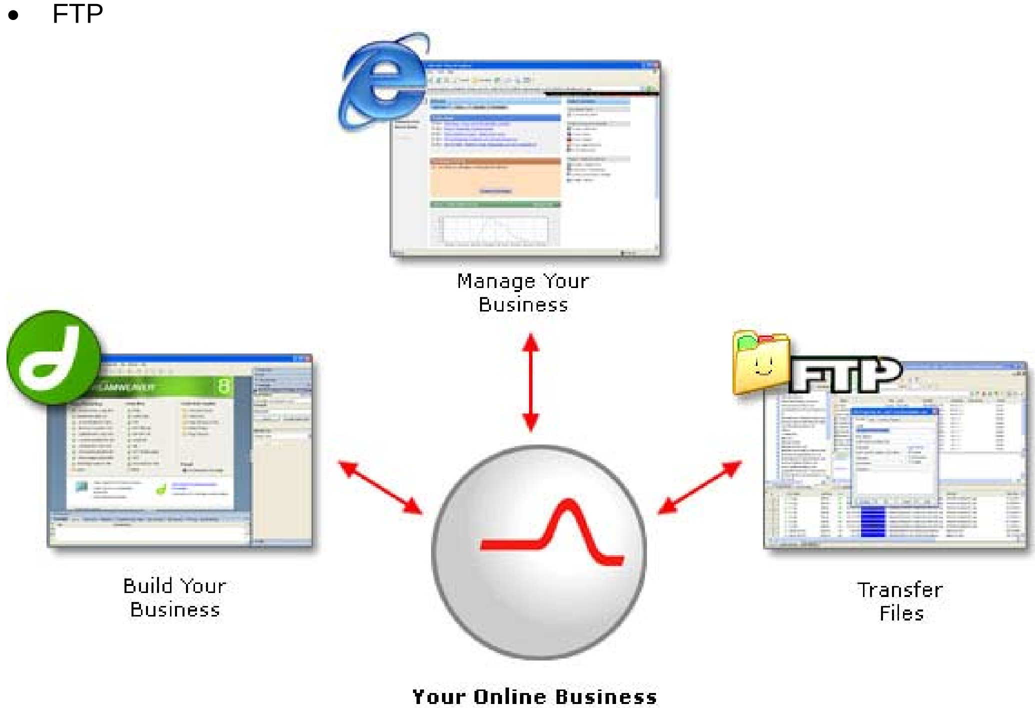
Now we have a clear roadmap to follow in order to implement our online business!

5. GETTING STARTED WITH YOUR ONLINE BUSINESS

5.1. Using the System

You can use the system via three methods:

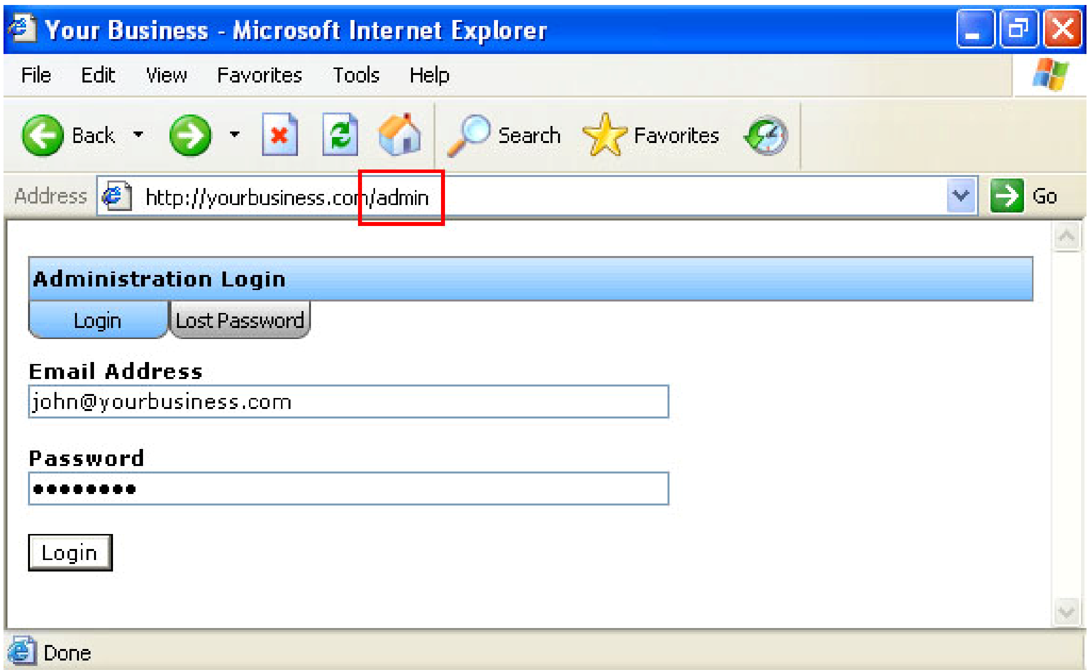
- The online web-based “Administration” interface, accessible from anywhere in the world using any popular web browser
- Triangle, our Dreamweaver plug-in which allows you to work directly inside Dreamweaver.
- FTP



5.2. Logging In

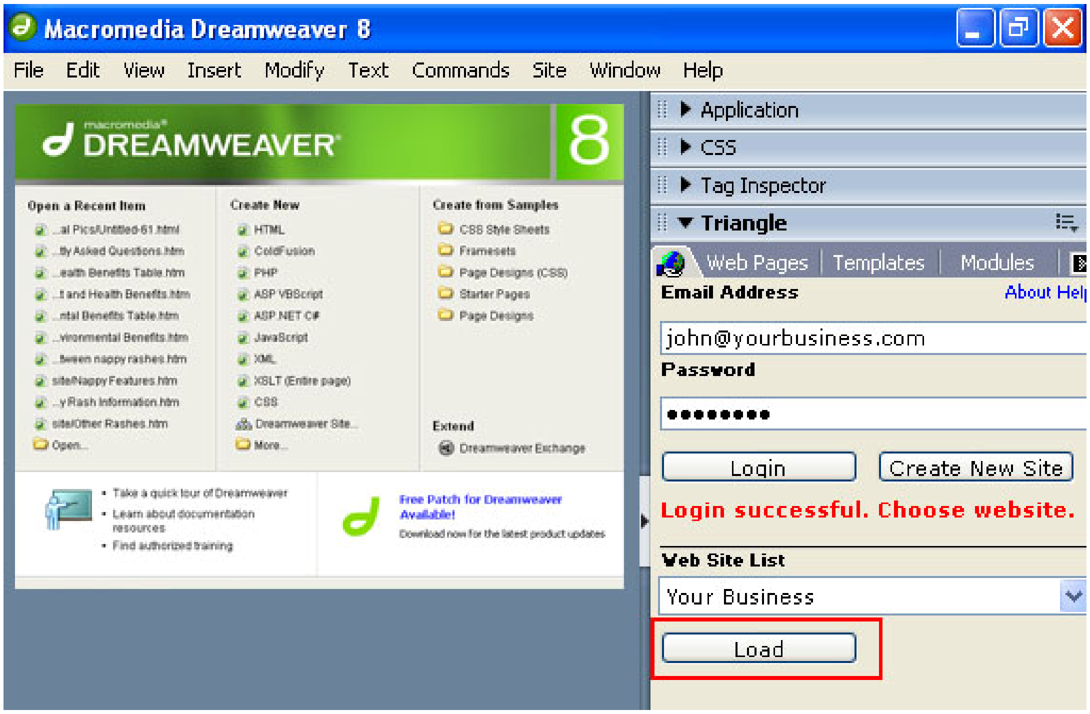
Using the web-based Administration

To log in, simply type in your site's address and append "/admin" to it. Type in your username, which is your email address, and your password.



Using Triangle within Dreamweaver

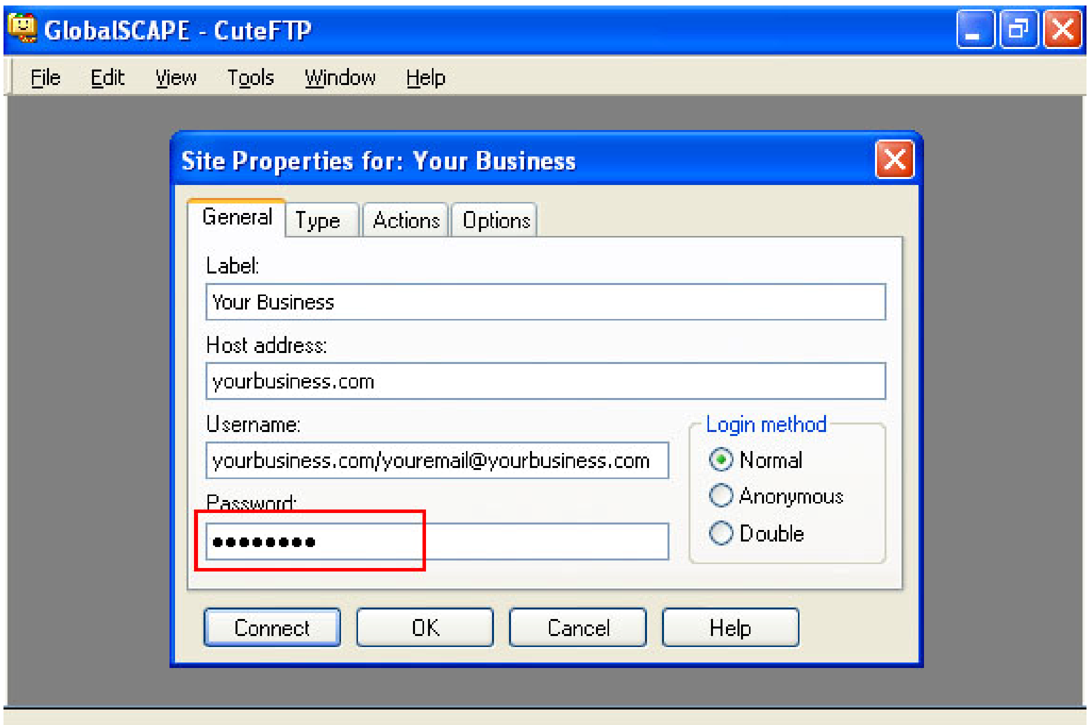
Enter in your username and password in the boxes provided. After you click to log in, select your site from the drop down list and click to load it.



Using FTP

Using your favorite FTP program, you can speed up the upload and download of your web pages and files. The required details depend on your site's URL. If your site's URL is **yoursite.com**, and your username for the system is **yourname@ yoursite.com** the details required to log in would be:

Host: **yoursite.com**
Username: **yoursite.com/youremail@yoursite.com**
Password: The same password as for the web admin



5.3. The Dashboard

The dashboard is the first thing you see if you have selected Home to be your landing page after logging into Admin. It gives you a "bird's eye view" of how your online business is performing. Use it to keep your finger on the pulse of your online business.

5.4. General notes on working with the system

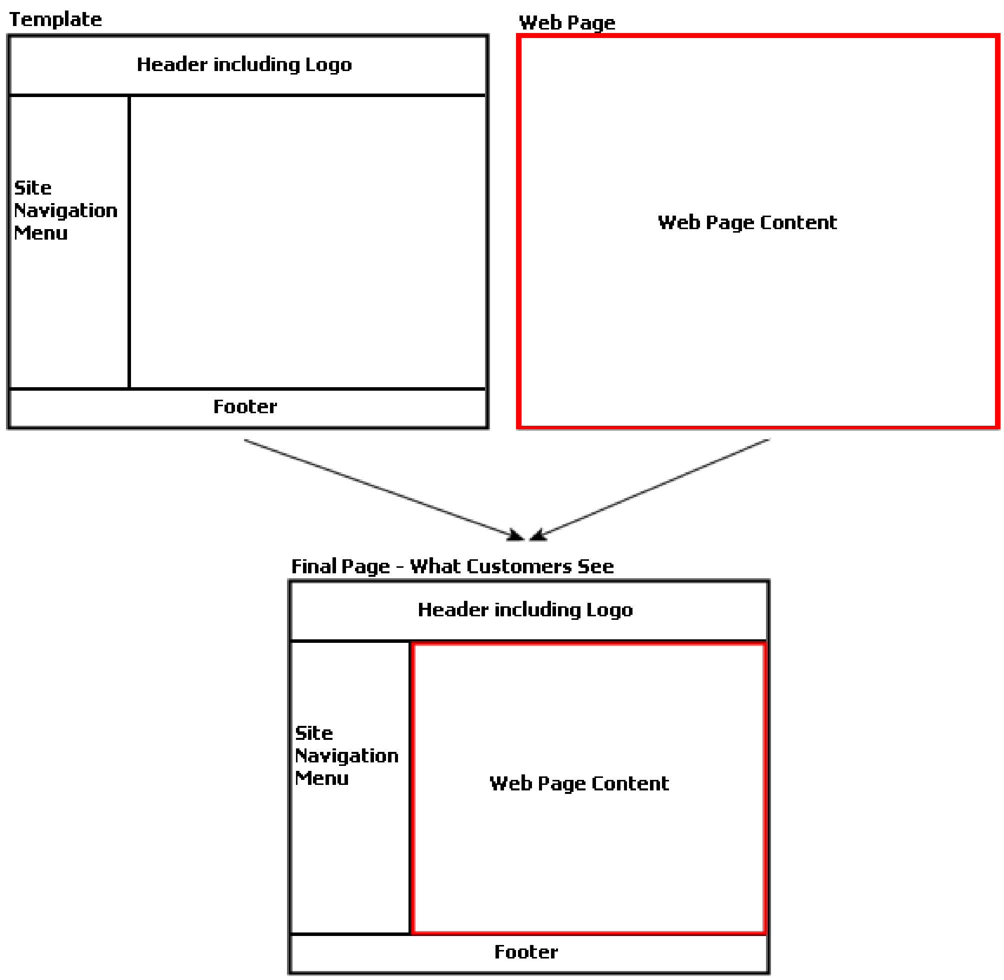
A Consistent Process – Top to Bottom

The system is organized in such way that most features have a wizard on the right that runs from top to bottom. Whether you are creating a web page or editing a forum, the process is almost always the same – start from the item on top and move to the bottom. Keep in mind however that you don't need to use all the menu item in the Wizard each time you add or edit an item.

5.5. Templates and Web Pages

What is a Template?

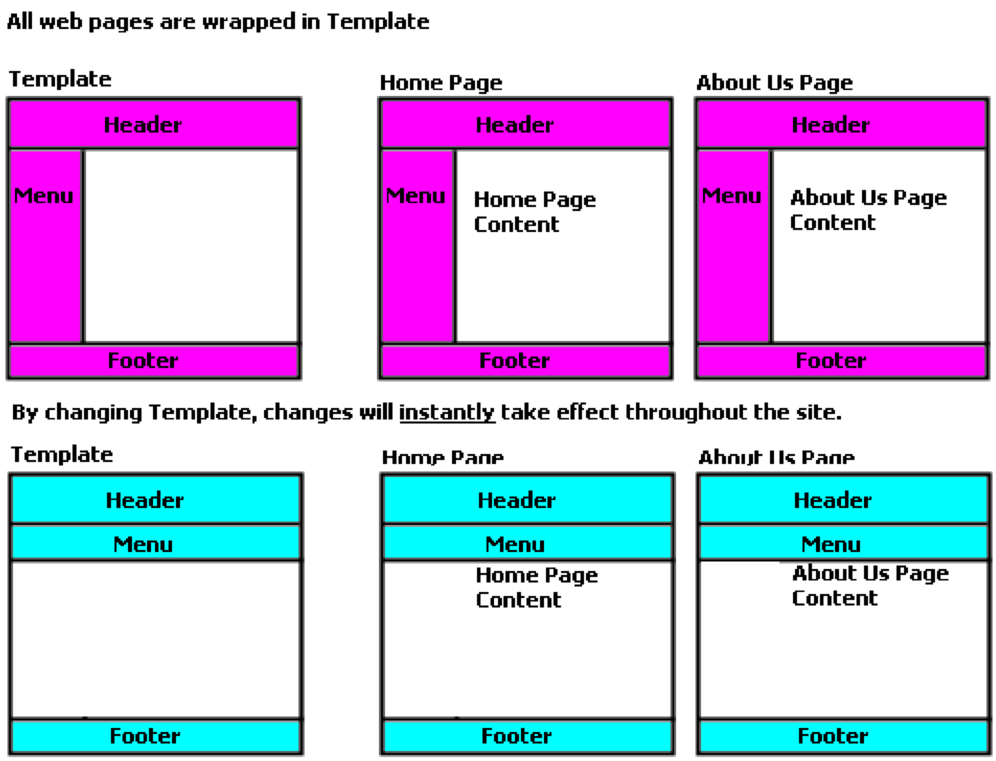
A template is a web page fragment that allows you to re-use content elements across your pages. Templates save a significant amounts of time, allowing you to avoid repetitive copying of common elements like page headers and banners, footers and navigation menus on every page. A template is designed to “wrap” around page content, thereby making each page take on a consistent appearance.



Why use a Template?

Apart from saving time, Templates are used for two key reasons

- To maintain consistent branding across all pages
- To manage your site's overall look and feel in one, central place – making a change to the template affects all pages that use that template.



What is a Web Page?

A web page is your basic content "container". Web pages generally use a template to "wrap" them in a consistent look and feel. Almost every type of content in the system needs to be added to a page to be viewed on the web site.

5.6. Creating and Working with Content

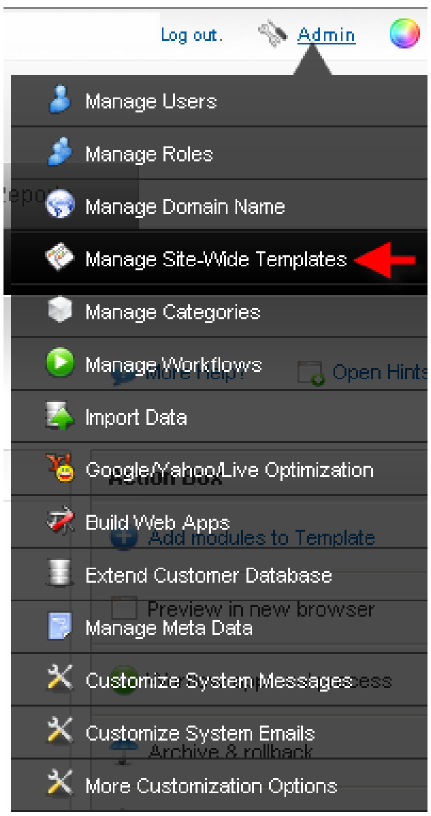
Creating a Template

Creating a template is easy – you can create a basic template in a few simple steps. As with many items in the system, creating a template consists of:

- Enter the details of the template
- Create the template's content

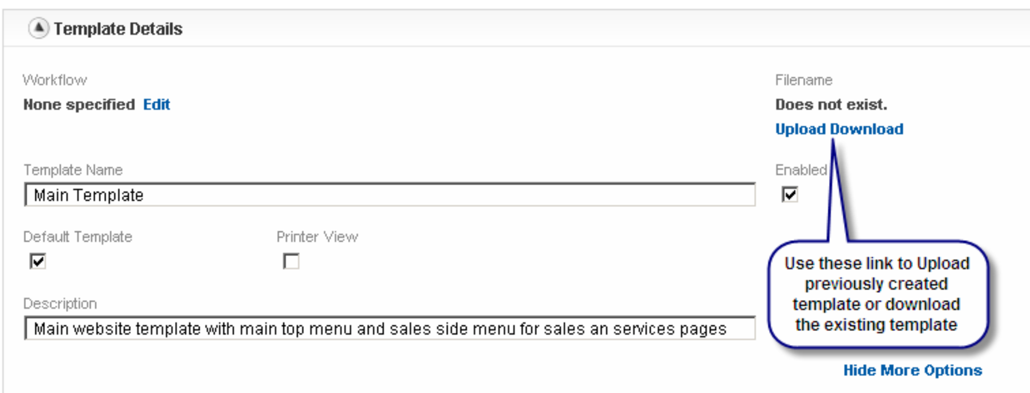
Firstly to add the details of the template, we do the following.

1. Click **Admin -> Manage Site-Wide Templates -> Create A New Template** to add a new template



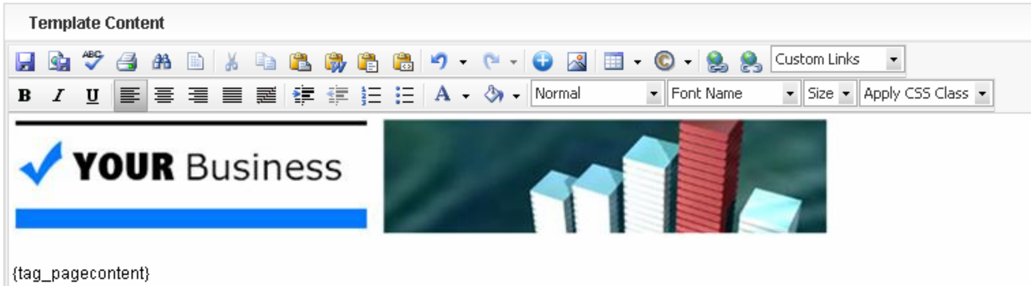
2. Enter in a descriptive **Template Name** for your template. If this template is the site's main template for your web pages, check **Default Template**.
   If this template is to be used as the printer template for wrapping content before printing (via the Printer View module, discussed later), check **Printer View**.

3. Clicking **Show More Options** allows you to:
   a. **Upload** a template file you have prepared previously
   b. **Download** the template file you have in the system already
   c. Enter a **Template Description**
   d. Assign a **Workflow Approval** to this template. By assigning a workflow approval to this template you ensure that you or the people you designate are notified to approve the changes before they go live.



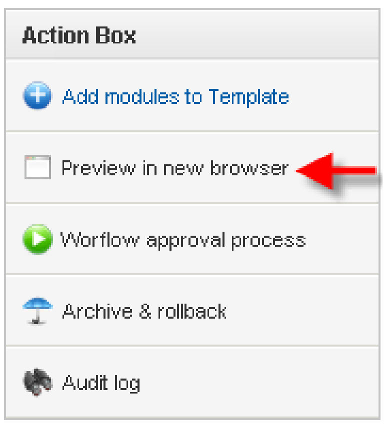
4. Click **Save** to create a working copy, or click **Save & Publish** to make your new template usable and viewable to the public.

Secondly, we enter the content of our template. Notice the **{tag_pagecontent}** tag. **This is where your page content will be inserted into the template**.



Now we are ready to create the basic layout for the template including the insertion of images and modules.

Click the **Preview in new browser** button to get an idea how your new template looks.



Creating a Web Page

Creating a web page is also very simple, and like a template, it starts with two basic steps:

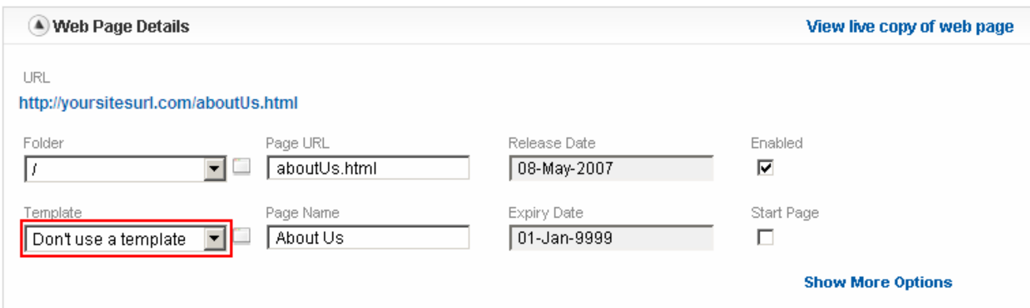
Step 1) Enter the web page's details

Step 2) Enter the web page's content

However web pages can be further customized including:

- **Meta Data** – for computers reading your web pages, such as search engines
- **Secure Zones** - to make your web page secure
- **RSS Channels** – to syndicate your web page

When entering the details of a web page, you need to choose which **Template** to use with this page. If you do not wish to use a template choose the "**Don't use a template**" option.

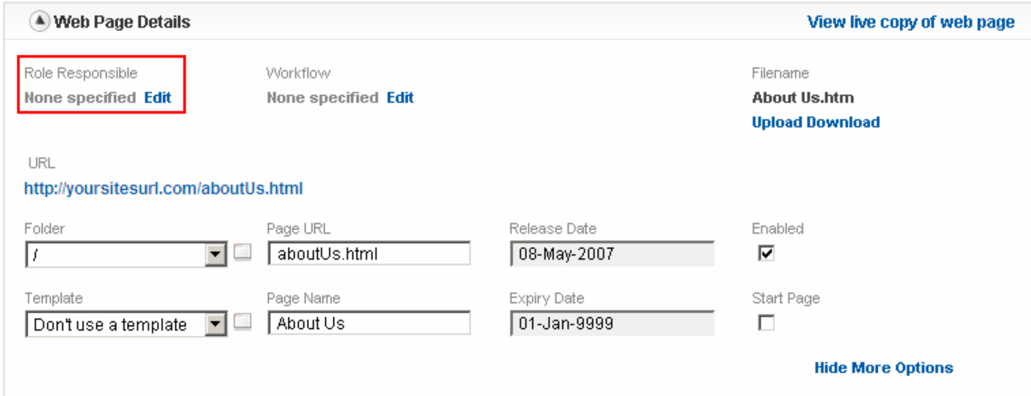


Also note the difference between a **Page URL** and the **Page Name**. The Page URL should end in .html or .htm, and forms the latter part of the web address of that page - which you can see underneath the "URL" heading. The **Page Name** is a "friendly" name and is manly used by the breadcrumbs and sitemap modules. It is also used to identify the web page within the administration system.

Release Date and **Expiry Date** allow you to release a web page in the future and expire the content of the web page when it is no longer valid. It's a set and forget approach that enables you to add your web pages in advance and have them automatically appear and then disappear from your website.

You can uncheck **Enabled** to make the page temporarily inaccessible, and check **Deleted** to delete the page permanently. Ensure you select Save & Publish to finalize your changes.

Click **Show More Options** to set up a workflow and upload and download files just like for templates. Unlike templates, pages have a **Role Responsible**. The members of this role are notified 7-days before the web page expires.



Every time you publish your web page a copy of the web page is archived at that time. This enables you to **Rollback** to any previous version and is useful if you have made a mistake and need to go back to where you started. To use this feature simply choose **Audit & roleback** from the **Action Box**.

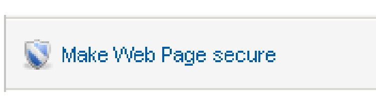
You will see a list of archived copies for this web page. You can preview past versions and rollback. This option is also available for Templates. Please note that archives are kept for 90 days only.

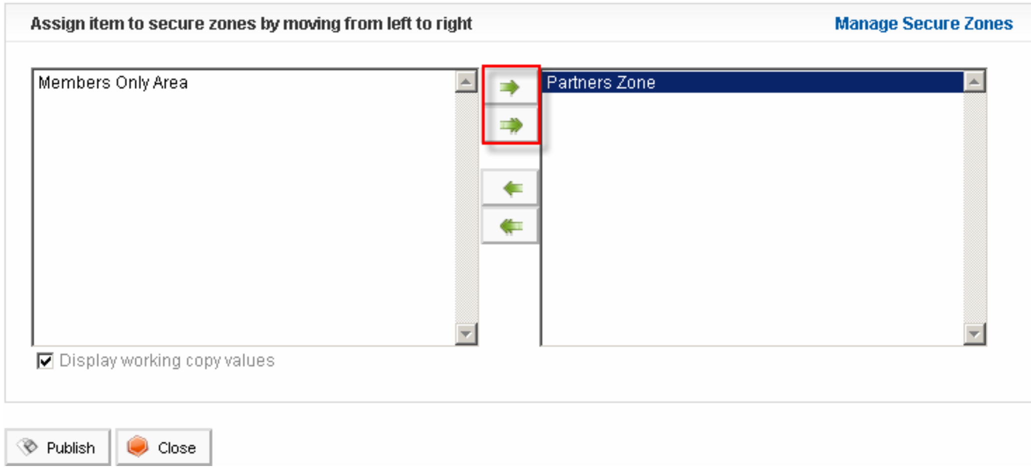
Go Back

Edited By	Archive Date	Name	Title	URLTag	FileName	Size	ReleaseDate	ExpiryDate	ID	View	Rollback
John Smith	29-May-2007 12:23:58 PM	About Us		/aboutUs.html	About Us.htm	2150	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	272631		
John Smith	23-May-2007 11:46:34 AM	About Us		/aboutUs.html	About Us.htm	2092	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	266891		
John Smith	23-May-2007 11:41:43 AM	About Us		/aboutUs.html	About Us.htm	2072	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	266890		
John Smith	08-May-2007 12:26:28 PM	About Us		/aboutUs.html	About Us.htm	2016	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	253249		
John Smith	08-May-2007 12:25:26 PM	About Us		/aboutUs.html	About Us.htm	2046	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	253247		
John Smith	08-May-2007 12:21:57 PM	About Us		/aboutUs.html	About Us.htm	198	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	253245		
John Smith	08-May-2007 12:07:42 PM	About Us		/aboutUs.html	About Us.htm	0	08-May-2007 12:00:00 AM	01-Jan-9999 12:00:00 AM	253221		

After editing the content of your page, you can add **Meta Data** to your page by clicking onto **Add metadata to Web Page**. All the basic meta data tags are already provided to you. However the meta data framework built into this system allows you to create your own meta data tags.

If you want to make your web page secure, click on **Make Web Page secure** and move your web page from left to right by assigning it to one or more **Secure Zones.** You can create an unlimited number of Secure Zones and manage your customer's subscription to each Secure Zone. This is discussed in a later topic.



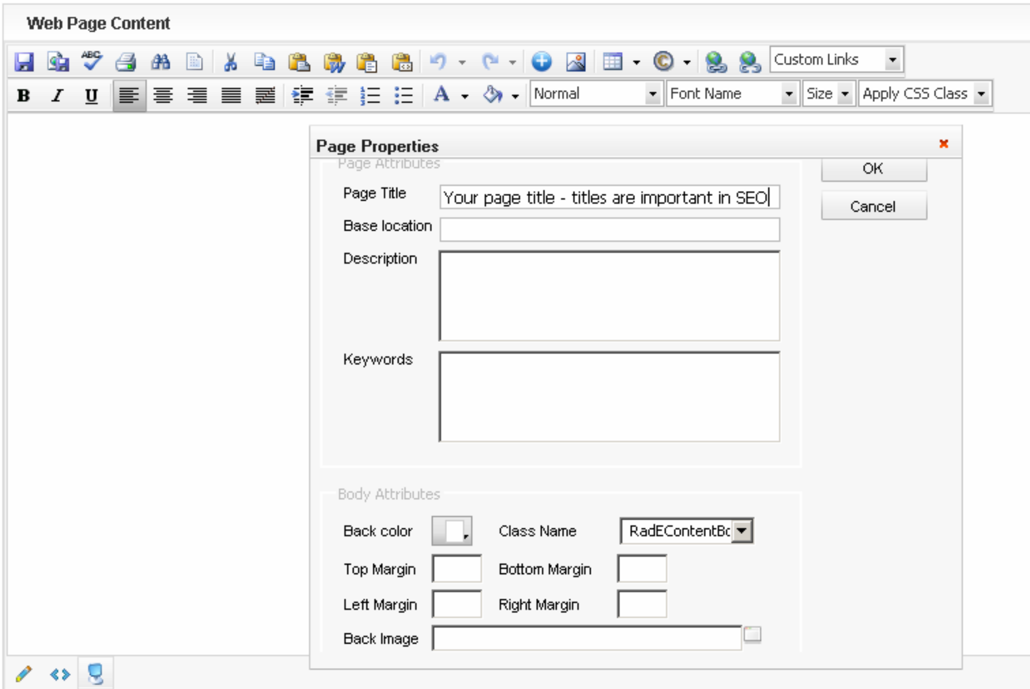


If you want to syndicate your web page content via RSS, add your page to an **RSS Channel** by moving the channels you'd like the web page to be in to right hand box. You can create an unlimited number of RSS Channels. This is discussed in a later topic.

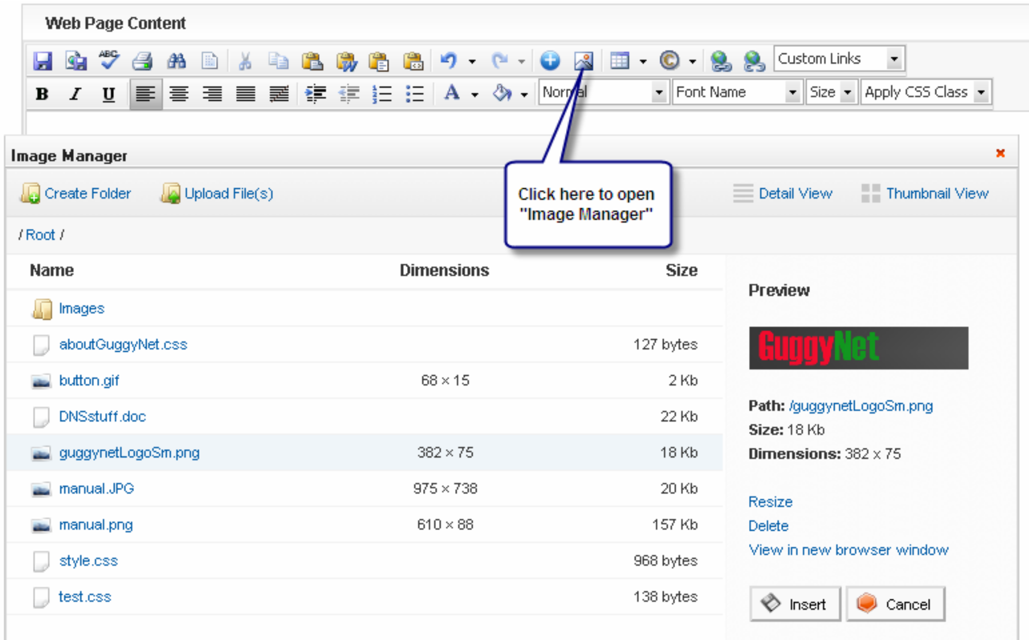
The Online WYSIWYG Editor

The Online WYSIWYG Editor is an extremely powerful visual HTML editor, with many of the features you would expect to find in a word processor.

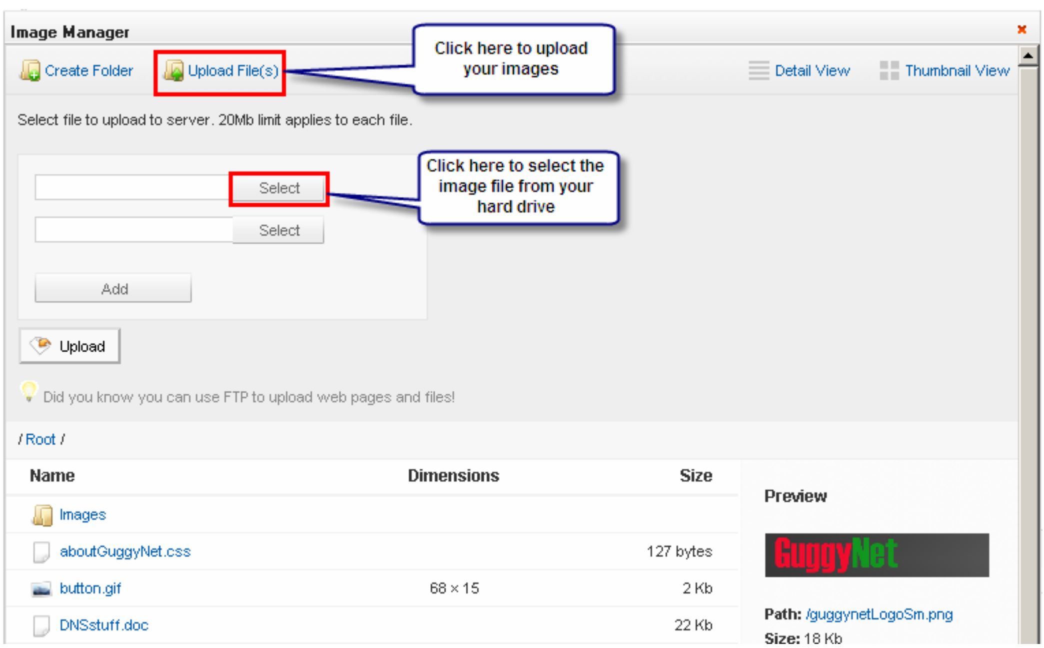
To modify page properties, such as **page title** and **meta data**, use the **Page Properties Manager**:



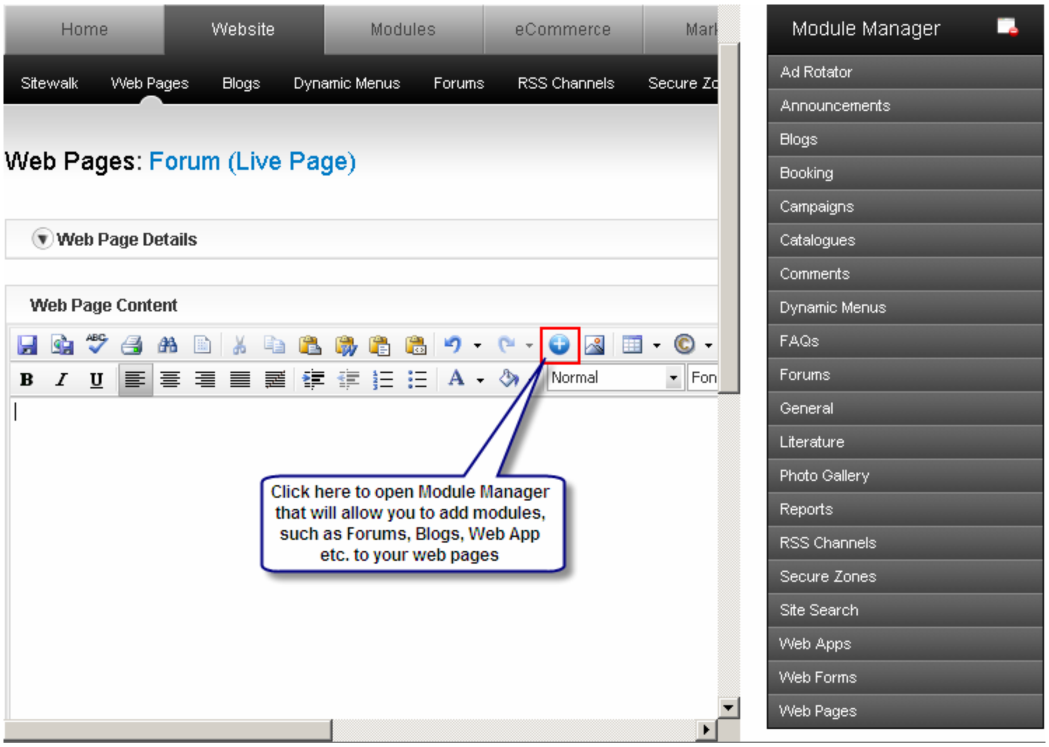
To add an image to your page, use the **Image Manager.** Once it's open, select image you want to add to the page and then click **Insert**. Use **Resize** to adjust image dimensions.



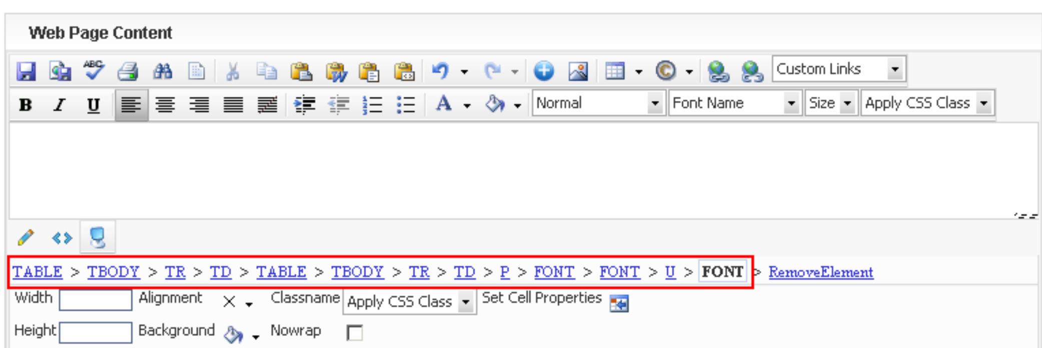
You can easily upload new images using the **Image Manage Upload.** This will allow you to upload images from your computer onto the server, which you can then use to add to your web pages and templates.



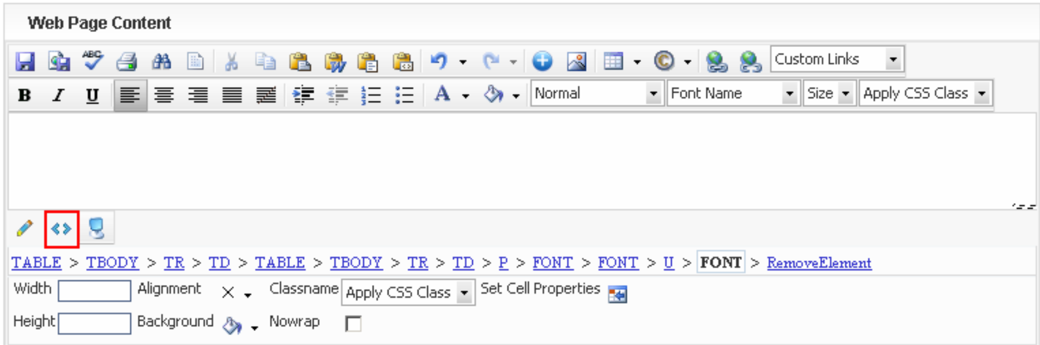
To add business functionality such as web forms, secure zones, forums, products and catalogues and so forth, use the **Module Manager**



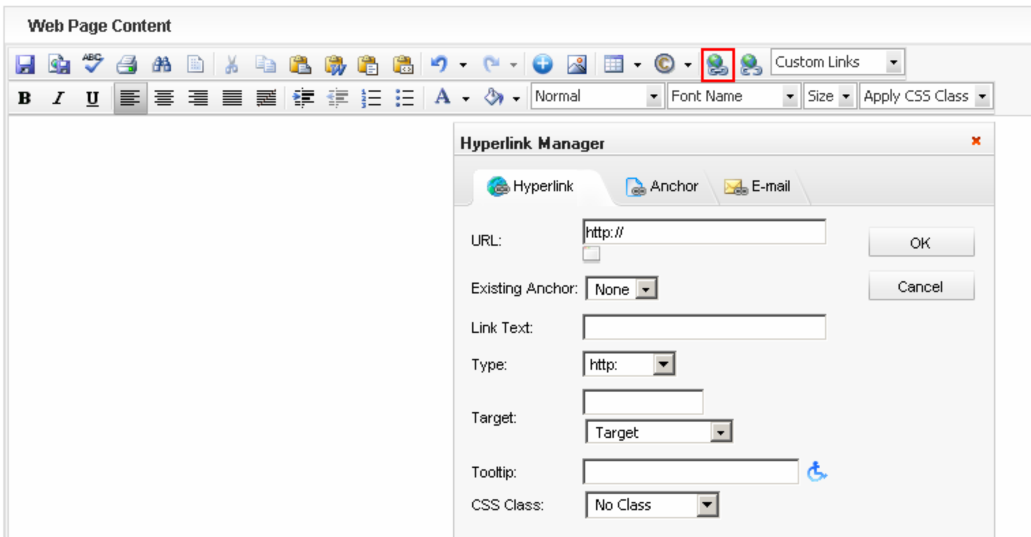
You can use the **HTML DOM Inspector** to zone in on the appropriate HTML tag you need to edit.



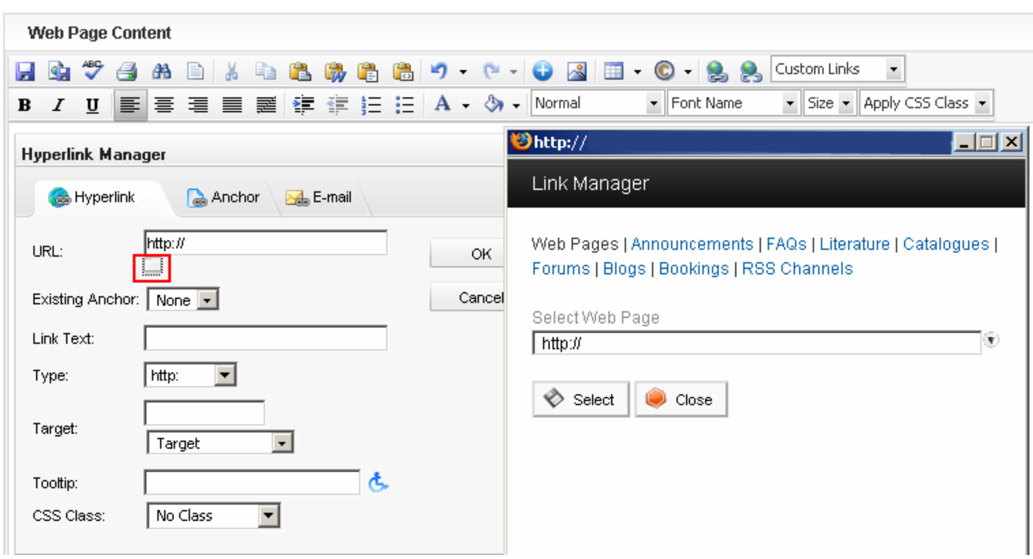
And if you need to edit the HTML code directly, you can switch to **HTML View.**



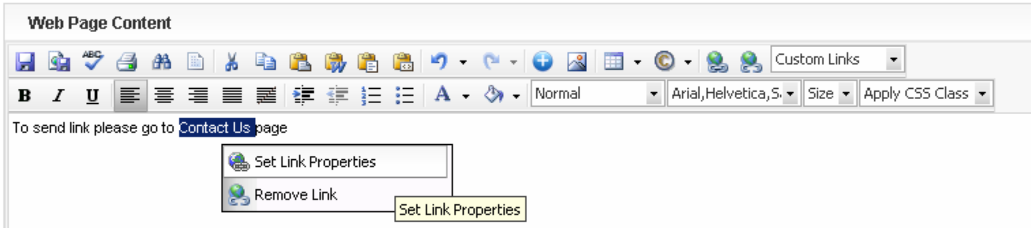
To add a link to any page, catalogue or other content type, use the **Link Manager**



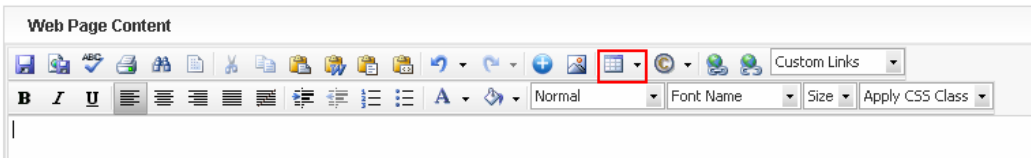
To add a link to content within the system, use the system's link manager



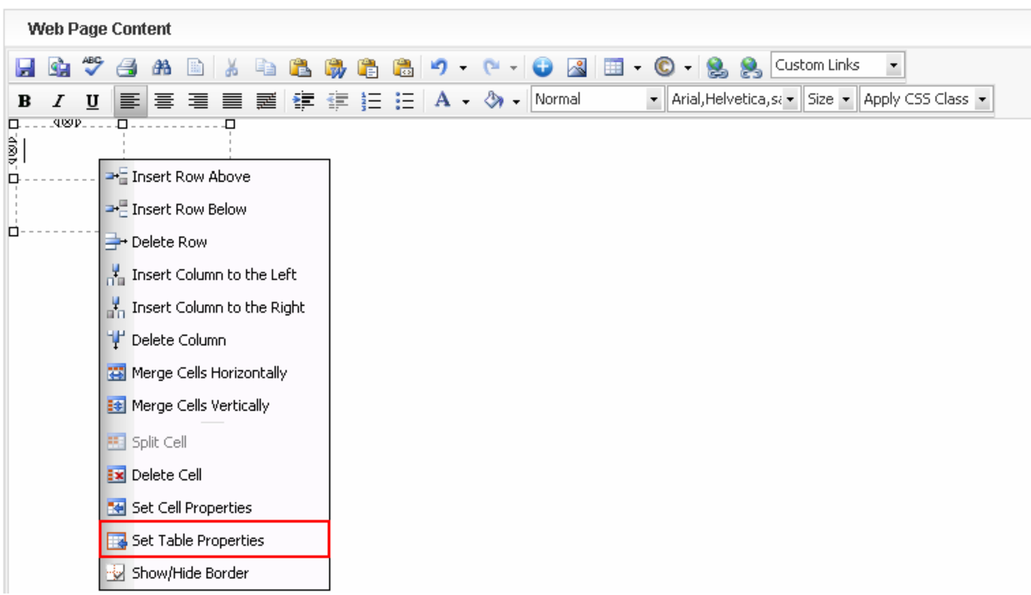
You can **right-click** on most parts of the page for further editing options.



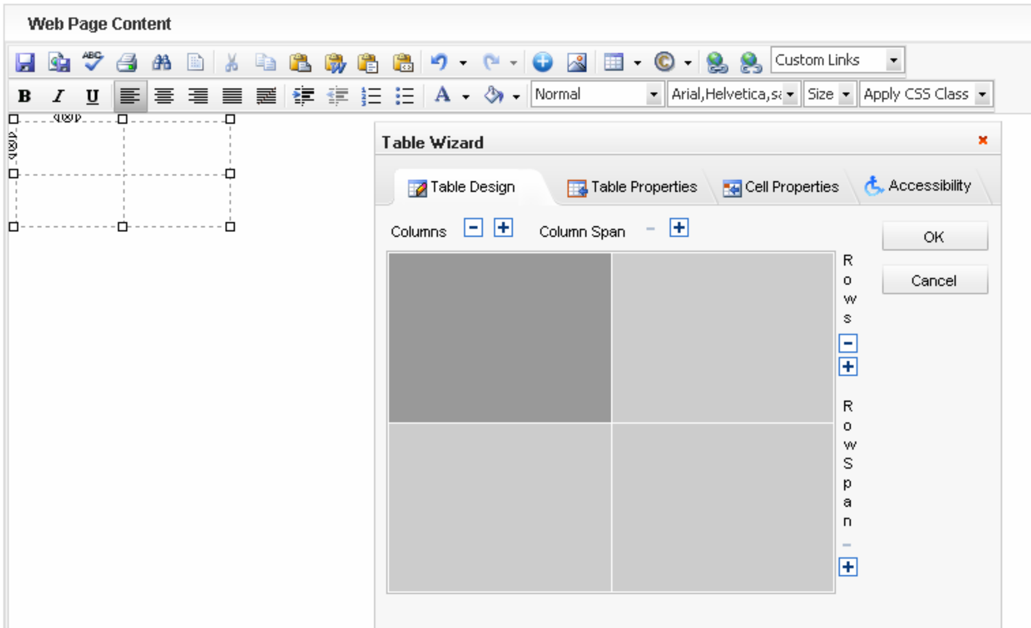
To add a table, use the **Table Manager**



You can set table properties by right-clicking on a table. You can also add and delete rows and columns, merge cells horizontally and verticaly, all with a right click of the button.



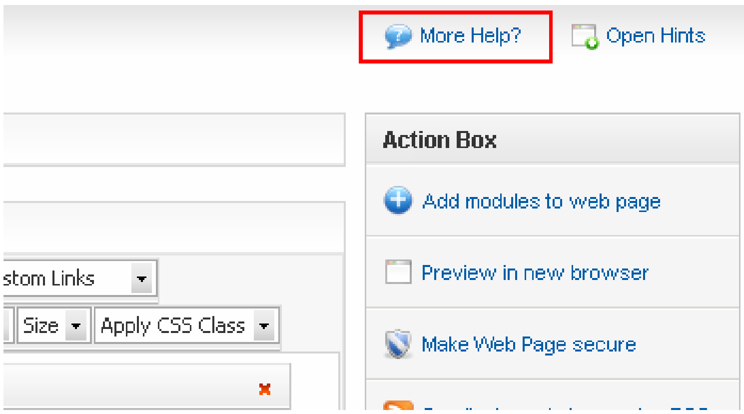
Tables can be edited with the table wizard



5.7. Getting Help

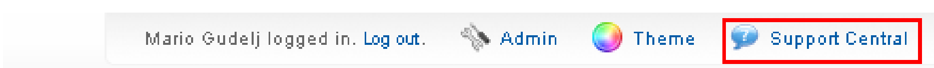
System Help

The help button is always available in the top right conerner above Action Box for each feature – click on it to display the context sensitive help for the current feature that you are working with.



Forums & Training Videos

Share your questions on our forums – it's a benefit to everyone! There is a link on the top right hand corner to access training videos and our support forums – **Support Central**.

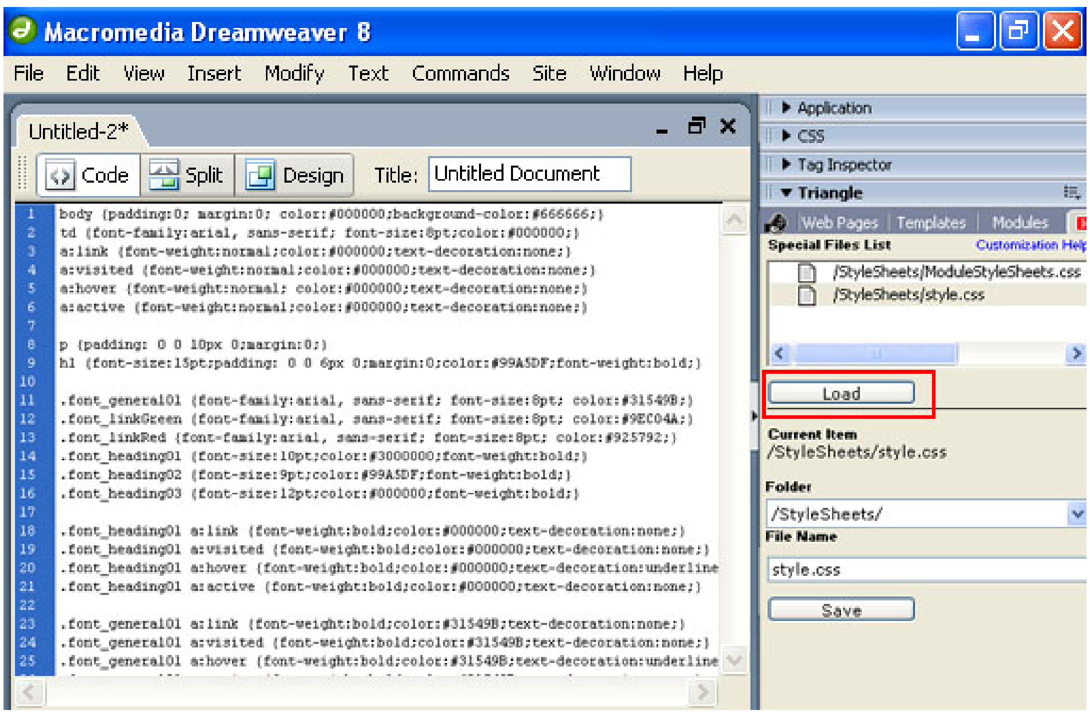


6. Building an Online Business: Tutorial

This is a tutorial to assist the implementer in building an online business from scratch. We will follow a process which uses Triangle, FTP and the web-based Administration to build the site. You will see step by step how you can build an online business from scratch.

6.1. *Style Sheets*

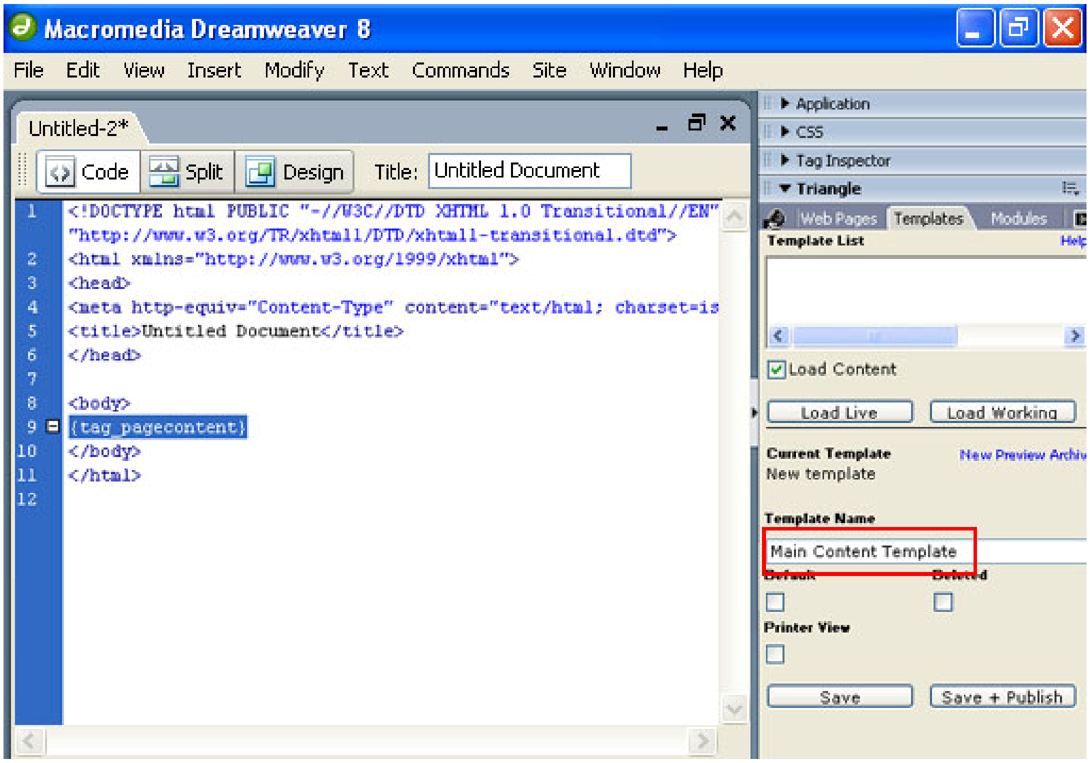
Let's start with cascading style sheets. Style sheets are a method used by designers to separate a site's look and feel from the site's content. You can prepare your style sheet using Dreamweaver or any other text editing tool.



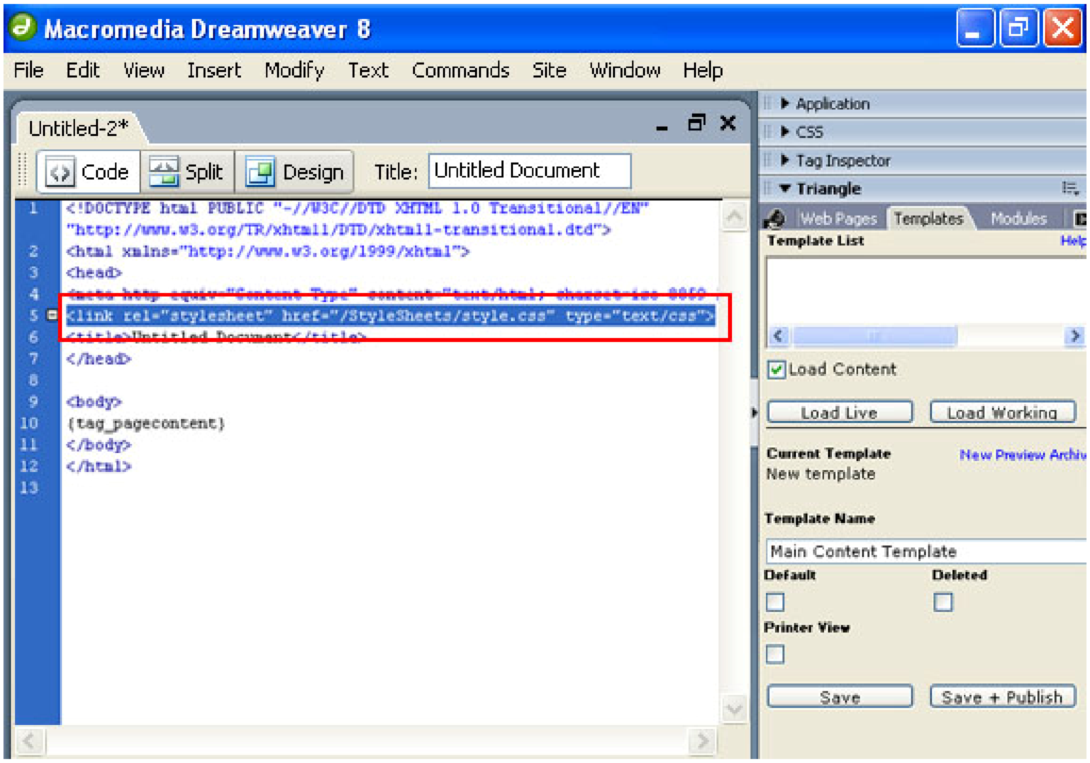
The system supports all modern web methodologies and technologies, including JavaScript, CSS and Flash. You can upload any CSS, JavaScript of Flash files, and link them into your templates or web pages as desired.

6.2. *Create a Template*

We now log in via Triangle and create **a new template**, giving it a name and description.

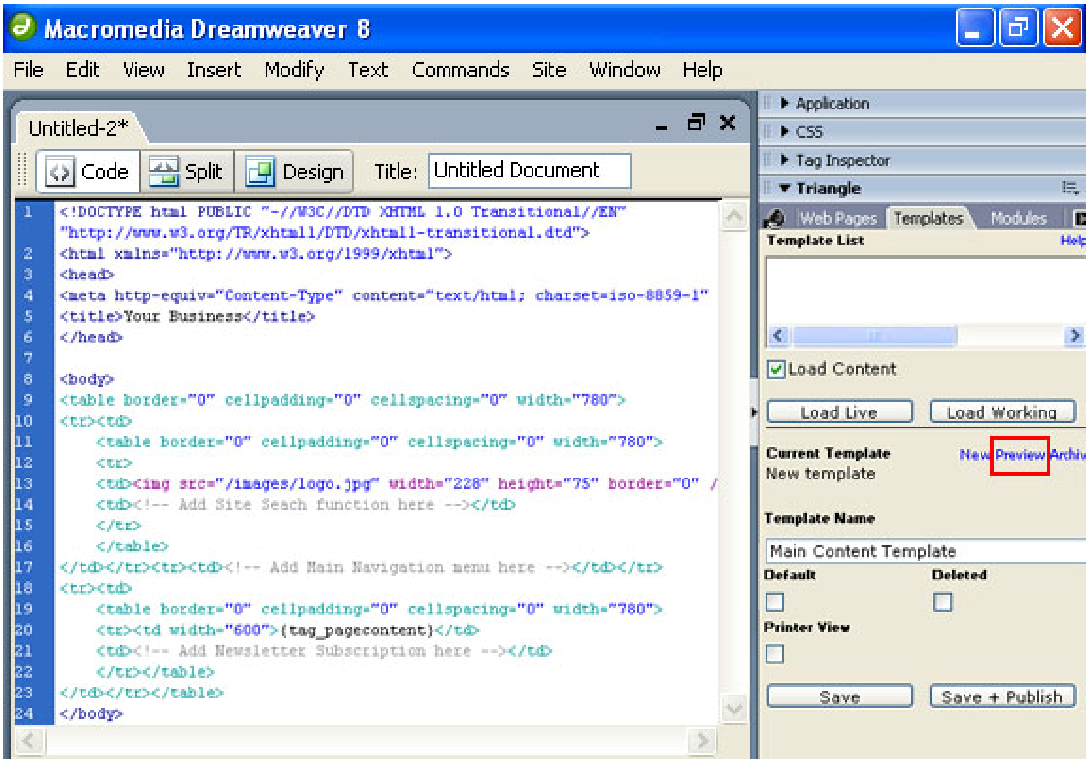


Link in the style sheet we created earlier within our HTML code.



Now we begin by **building our header and footer** elements, inserting images and so forth. As you go, you should upload your images via FTP.

We’ll **leave notes** indicating where our modules such as Dynamic menus should go. We’ll be using Dynamic Menus, Site Search and Newsletter subscription box. Use **preview regularly** to make sure things appear as they should.



Printer View and Email Templates

Every site usually needs three templates:

- A **Default** template
  The **Default** template represents the general look and feel of your site. This template is usually applied to your web pages and other content.

- An **Email** template
  The **Email** template is the template you apply to your outbound emails. It should be simple and light on the HTML. No functionality modules can be used in an email template.

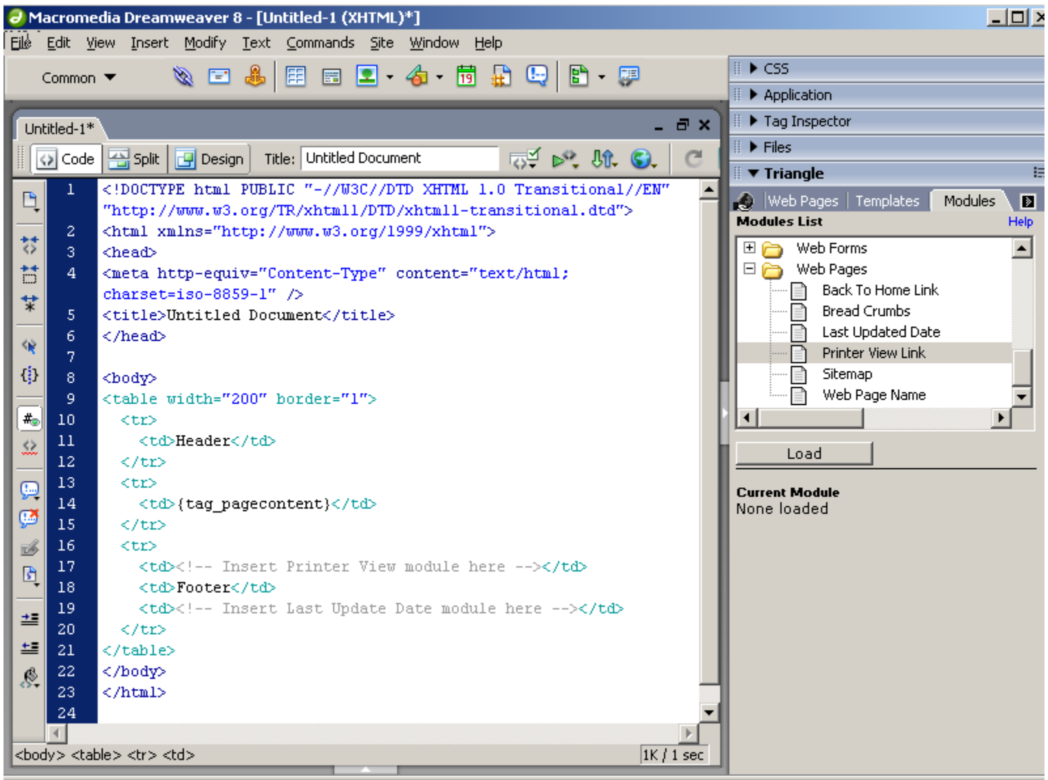
- A **Printer View** template
  The **Printer View** template is used when generating the output for a printable page. It can contain functionality modules, but should be graphically simple – and hence easy to print out.

You can create all the various template types in Triangle. You can set a template to be default or printer view by selecting the appropriate checkbox. Email templates are templates you use with your email newsletter campaigns – there is no mechanism to designate a template as an “email template”.

Note: Email templates cannot contain modules.

Adding Printer View Module to your template

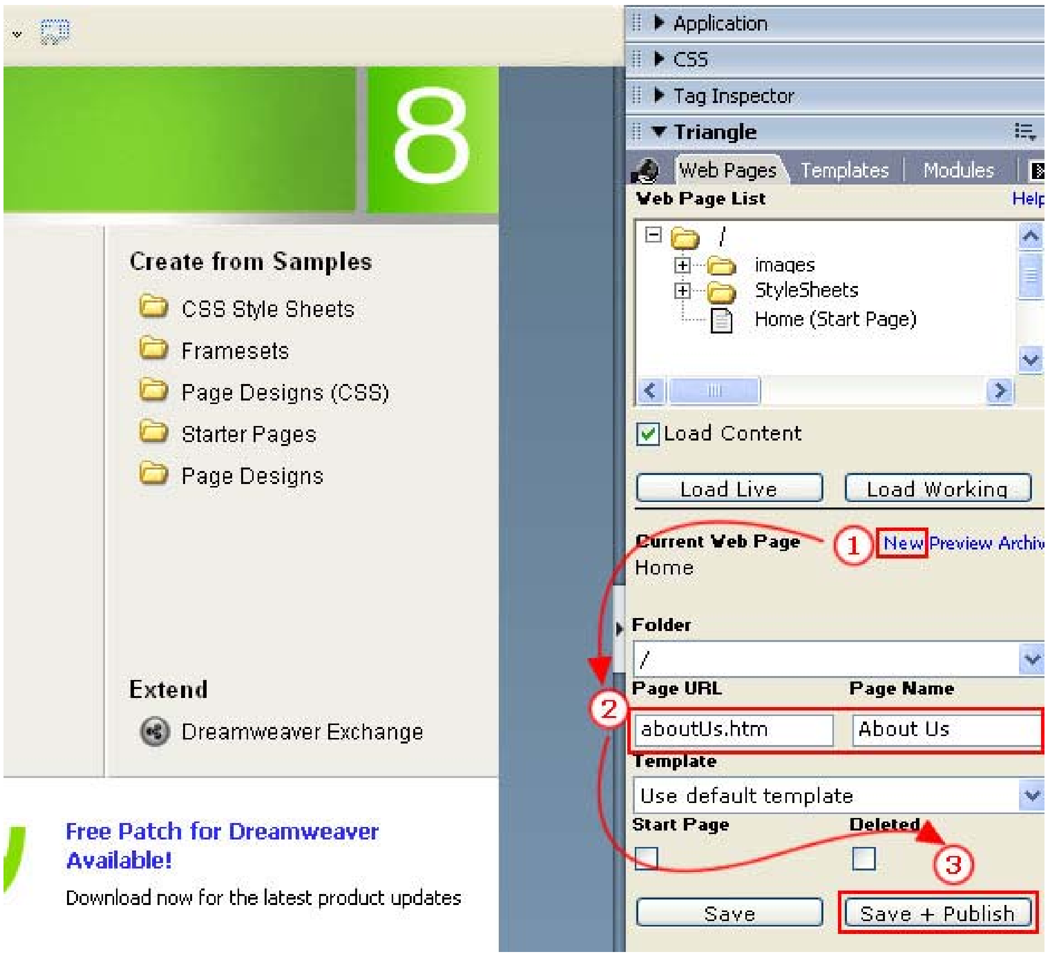
The **Printer View Module** allows you to automatically insert a hyperlink to a version of the web page that is more suitable for printing. The printer view will display the web page without information that may not be relevant such as the menu navigation, headers and footers. Printing this extra information often takes up more space and wastes more paper. Having a printer view option removes this problem.



6.3. Setting up Dynamic Menus

Create empty pages

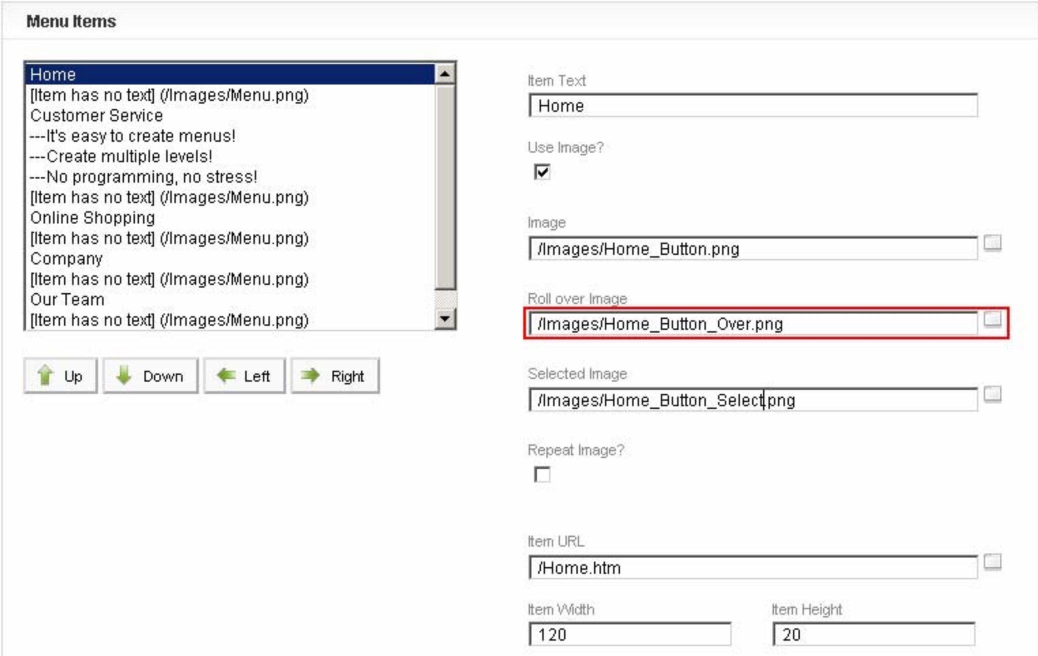
Following your Site Matrix, **create all the pages** you need, and give them a descriptive name and a URL that ends in ".htm" or '.html". Leave their content empty – you don't need them just yet.



Create your Dynamic Menu

Log in to the web-based Administration to start creating your site's menu. Dynamic Menus allow you to manage your site's navigation menus centrally, meaning any change to your menu is updated everywhere it is used! They are cross-browser compatible and require no programming.

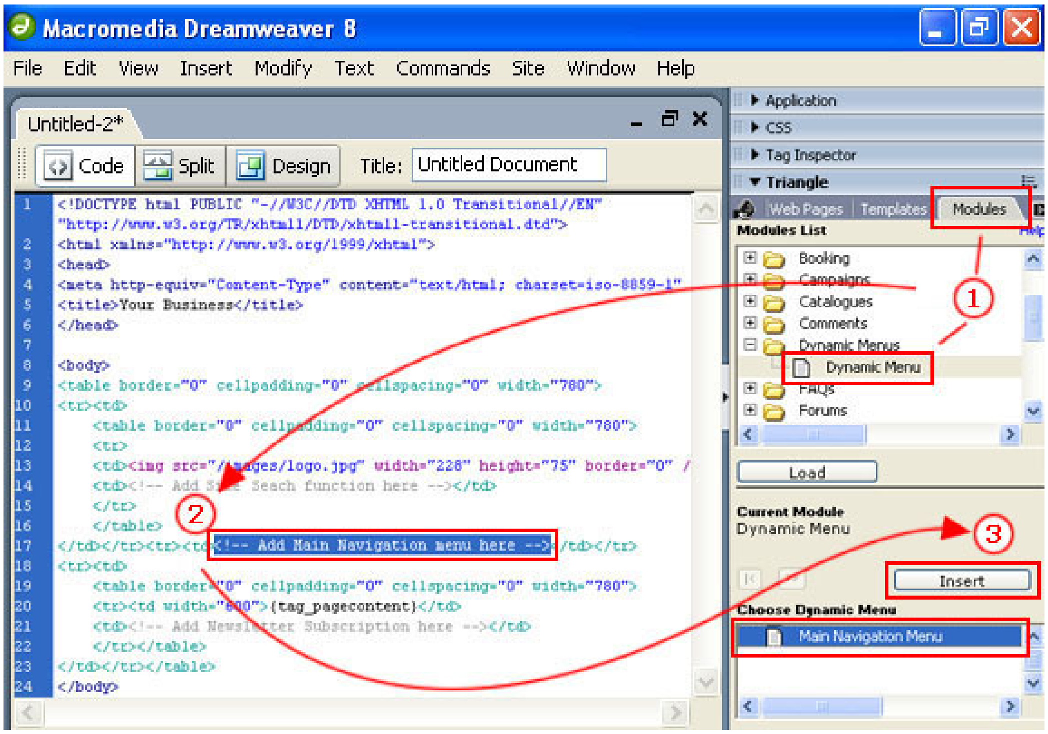
Click **Create a New Dynamic Menu** to create your new menu, and give it a name and then click **Next**. You can add new menu items by giving them appropriate name and clicking the **Save Item** button. Create each item as you desire, linking the **Item URL** to the blank pages you just created or the existing pages on your site. Note that you can **completely customize** the menu items with images, CSS and so on.



Under **Customize Menu Look** and **Customize Item Look** you can further customize the look and feel of your menu. You can find more detail on this in later chapters.

Adding your Dynamic Menu to your Template

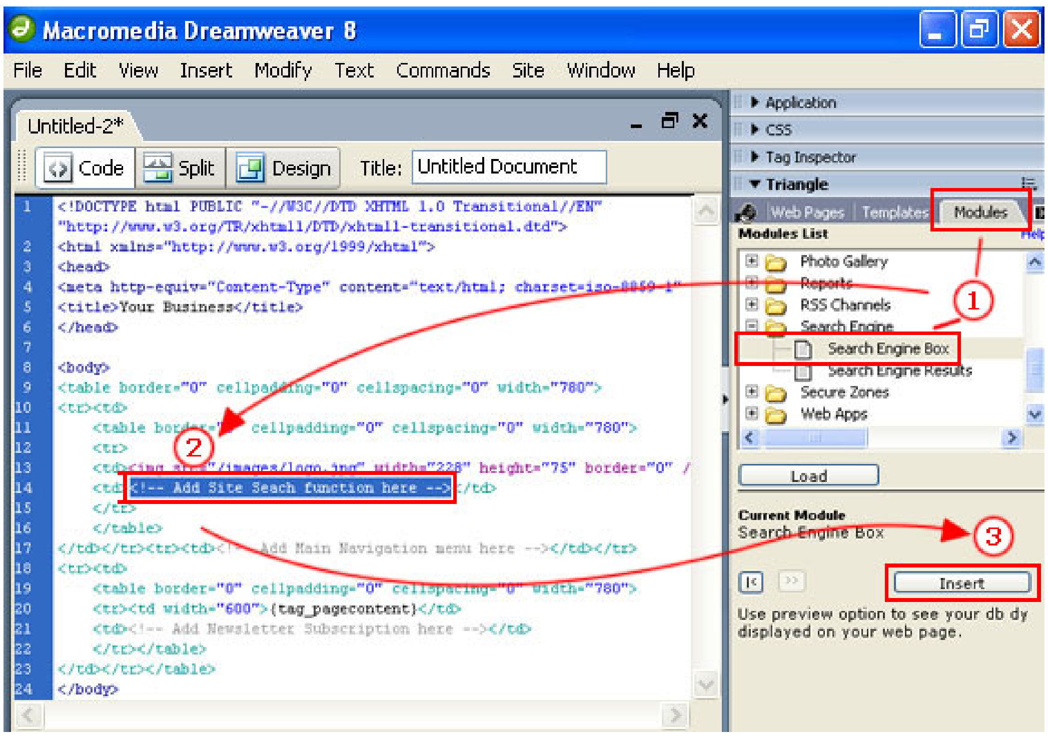
Back in Dreamweaver, click on the **Modules** tab and navigate to Dynamic menus. Highlight the **note you left earlier on the template**. Select the menu you just created, and click to insert.



6.4. Setting up Site Search Engine

Site Search is a great way to add powerful search functionality to your site quickly and easily. A Search Engine for your site is already set up for you, so you can just insert it directly. The Search Engine feature allows website visitors to search through all the web pages, announcements, FAQs, Web App items and Literature including PDFs and Word documents.

Select the **note you left earlier on the template**. Now go to the **Modules** tab and select search engine box. Click to insert it!



By default the search results will appear on this web page in **{ module_searchresults }**. However as this is a template, we need to reconfigure the search feature to use a different search results page. **Delete** the **{ module_searchresults }** from your template. You'll need to put that on the search results page we created earlier.

Link the search engine box to the results page. Do that in the HTML view by modifying the search engine box's code.

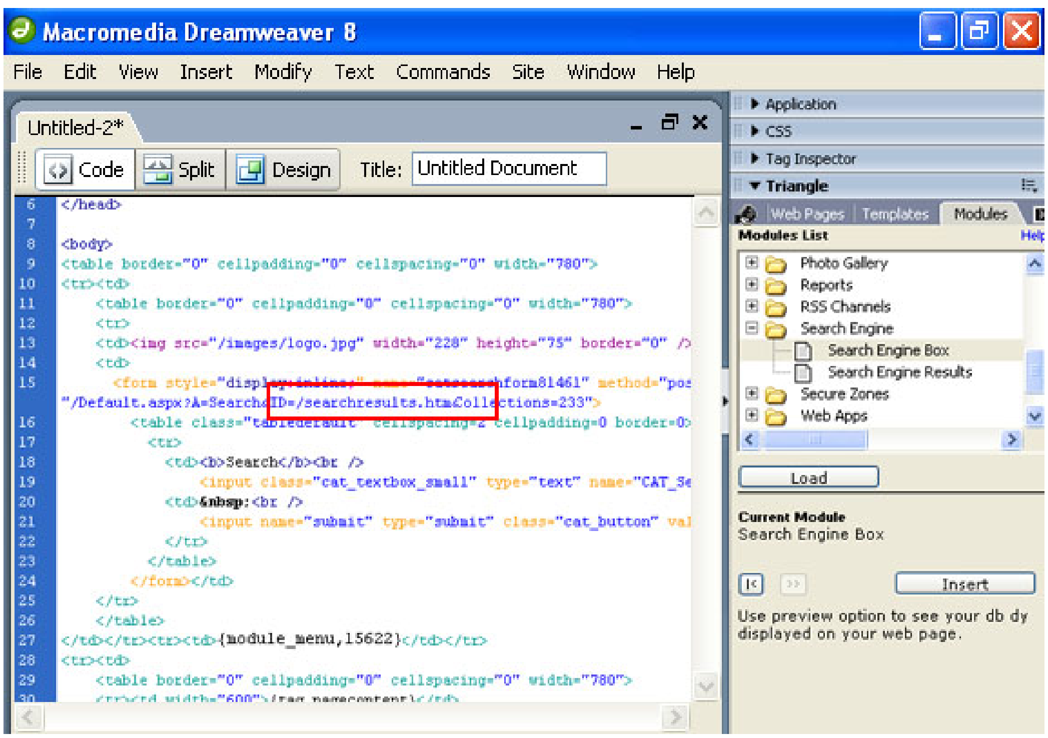
Change:

PageID={ module_oid }

To:

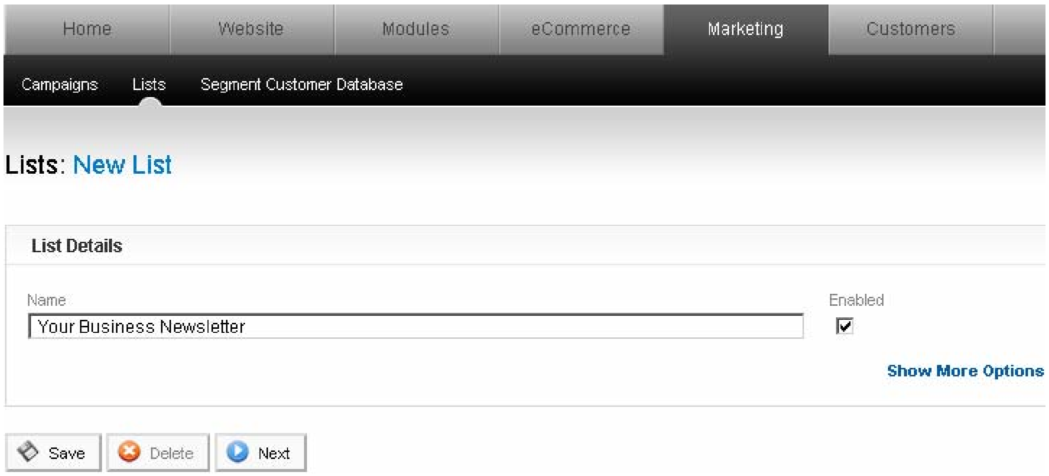
ID=/Results.htm

Where **/Results.htm** is the path to your search results page. Page paths must start with a slash (/).

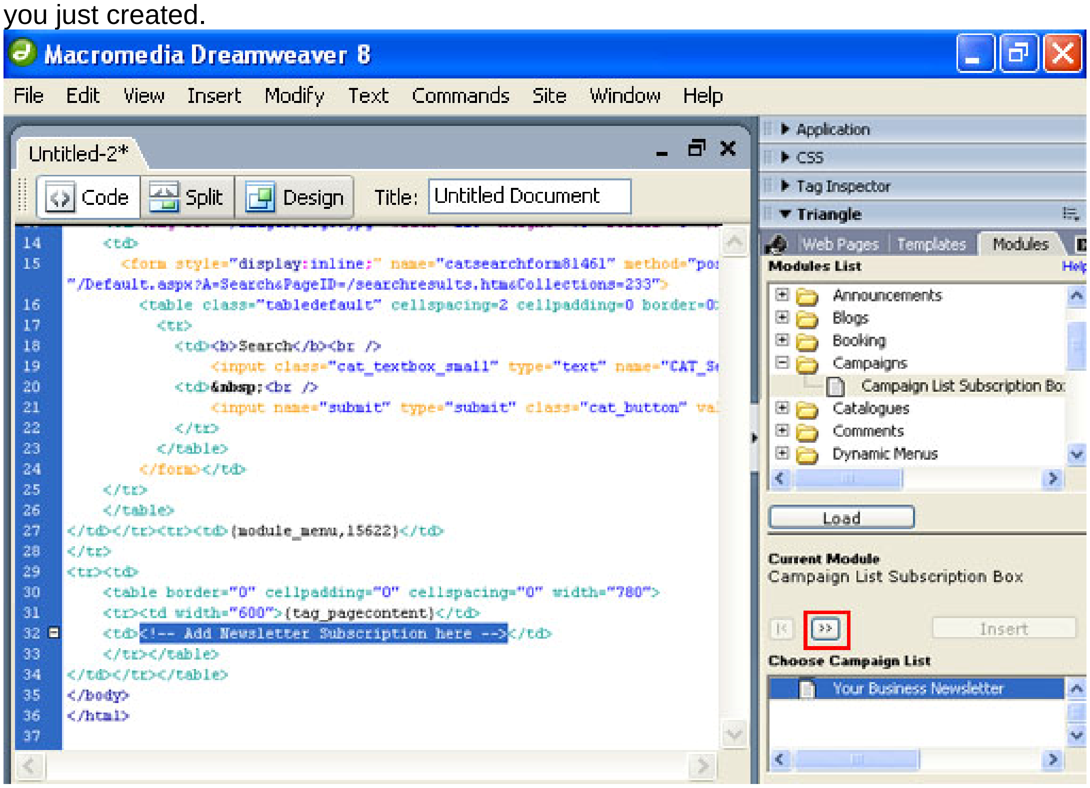


6.5. *Setting up Newsletter Subscription Box*

A Newsletter subscription box is an effective way to grow your customer database. First we need to **create a new list** for our newsletter. We do this via the web Admin, under **Marketing -> Lists**. Click **Create a New List** and enter a name for the list, then click **Save**.



Now in Dreamweaver click on the modules tab. Under **Campaigns** click on **Campaign List Subscription Box**. Now click **Load** and choose the campaign list you just created.



Click next twice by clicking on the **>>** button twice. Select and highlight the **note you left earlier on the template**. Now click **Insert**, and you're done.

6.6. Create your Web Pages

Earlier we created a number of empty web pages when we were building our Dynamic Menu. We now want to return to those and add our content and images. Click on the **Web Pages** tab in Triangle and load each page. For each page:

- Create your **layout**
- Add your **content**
- Add any **images** as you require, using FTP to upload them as you go
- Leave **notes** in the places you want to add your advanced functionality. You'll come back to these later.
- Select a **template** to use
- **Preview** as you go

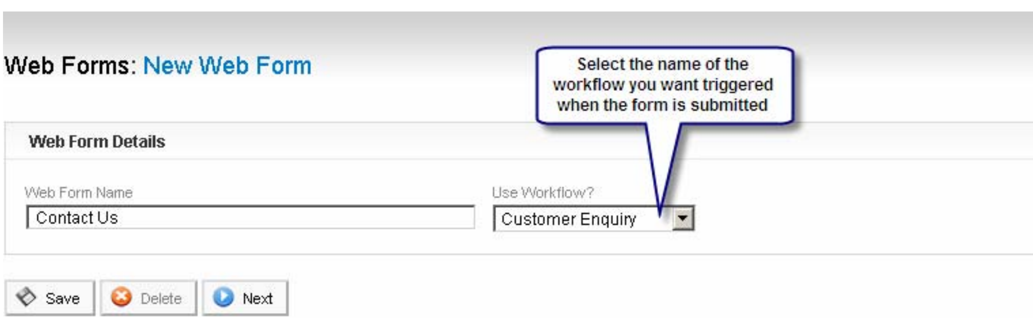
6.7. Create a Contact Us Web Form

When your customers visit our online business, you want to give them the ability to quickly and easily contact you via a web form. Creating a Contact Us form is extremely easy and can be done in minutes. First we need to create a web form.

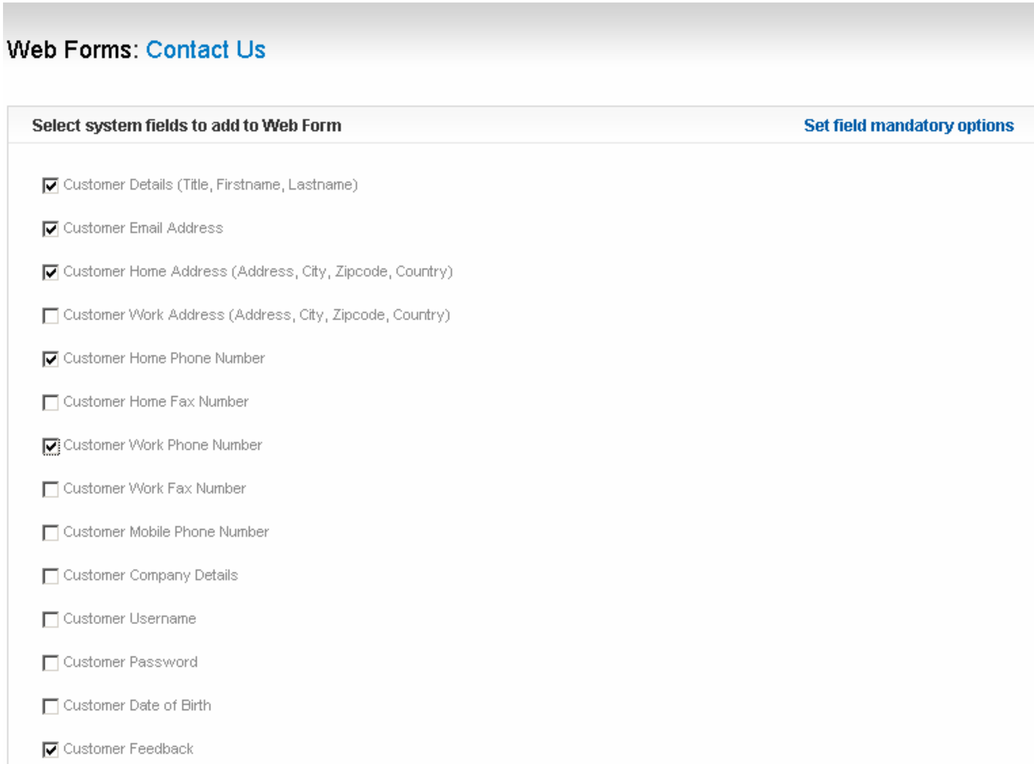
<u>Creating a Web Form</u>

To create a web form, go to Modules -> Web Forms -> Create a New Web Form. Now we give the web form a **name**, and if we choose we can associate a **workflow** with the web form.

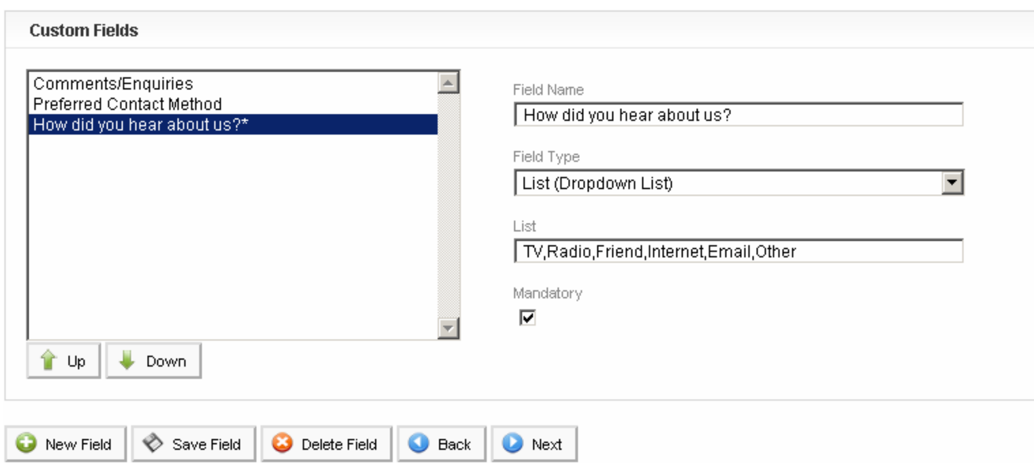
A **workflow** is a business process that you can create and attach to any web from. Workflows allow you to automatically notify staff via email or SMS when certain events occur, such as a customer enquiry via a web form. Reminders and escalation can also be configured when creating a workflow.



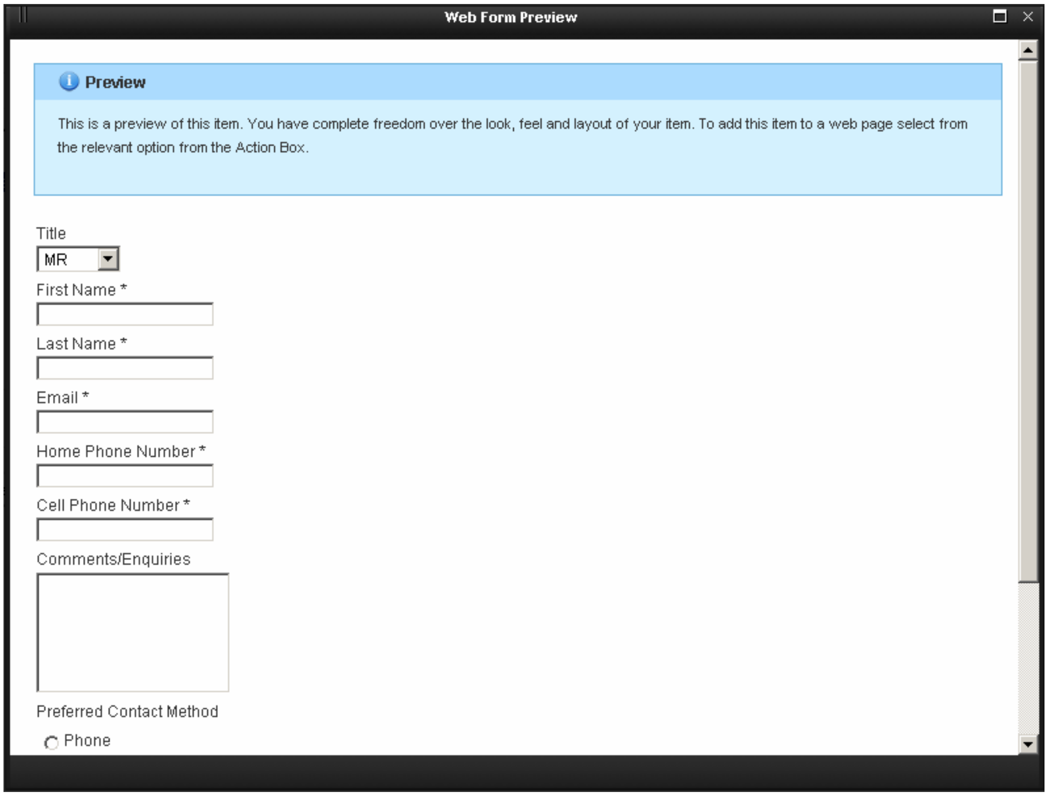
Now click on **2. Add system fields to web form** in the Wizard box and choose from a list the fields you want to add to your new web form.



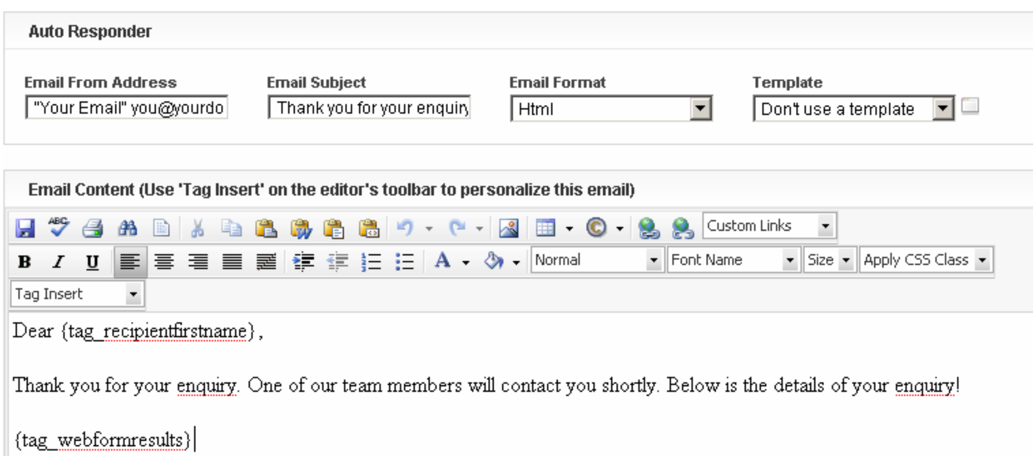
The Web Form feature allows you to create and attach your own custom Fields to any web form in order to completely customize it. You can create fields of many different types, including lists of values, text and date fields. Do this by clicking on **Add custom fields to Web Forms** and create appropriate fields.



Incrementally **Preview** the web form to see what it will look like, using the **Preview Web Form** button.

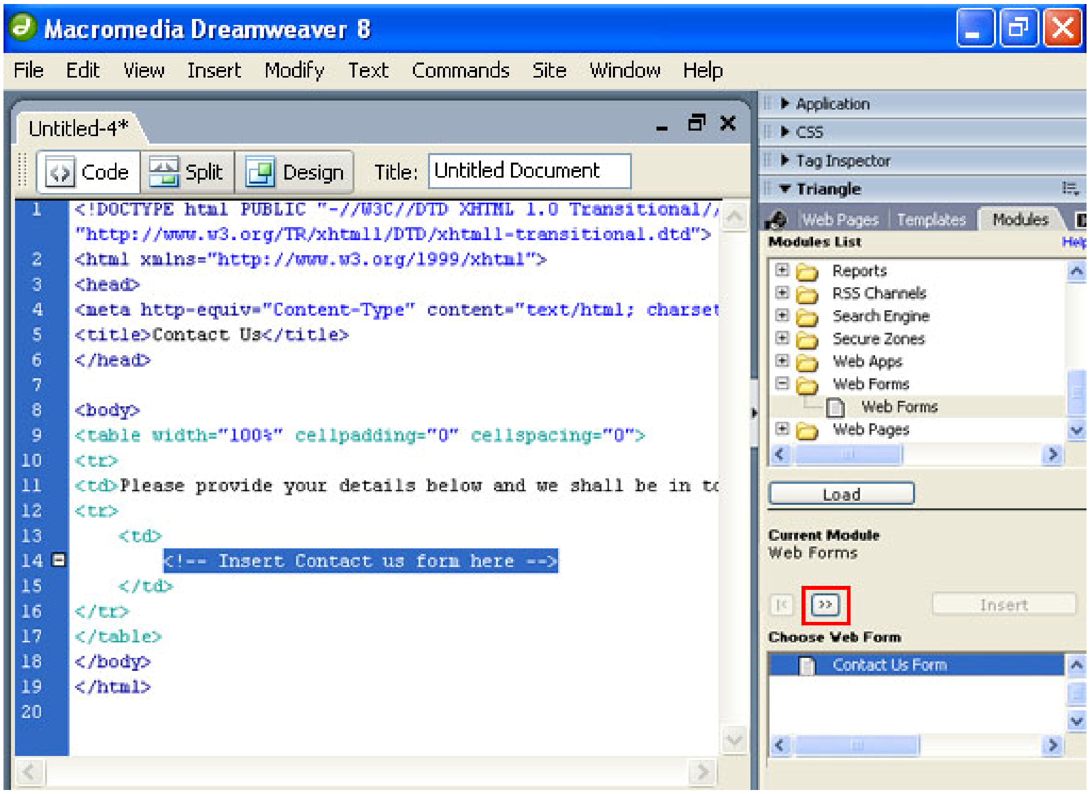


You must **Setup Auto Responder** for your web form. Auto responders are emails that are automatically emailed to the customer after their submission. This email should thank them for their submission and confirm that a customer representative will be in touch. You can also include a summary of the web form submission in this email. Auto responders are mandatory for web forms.

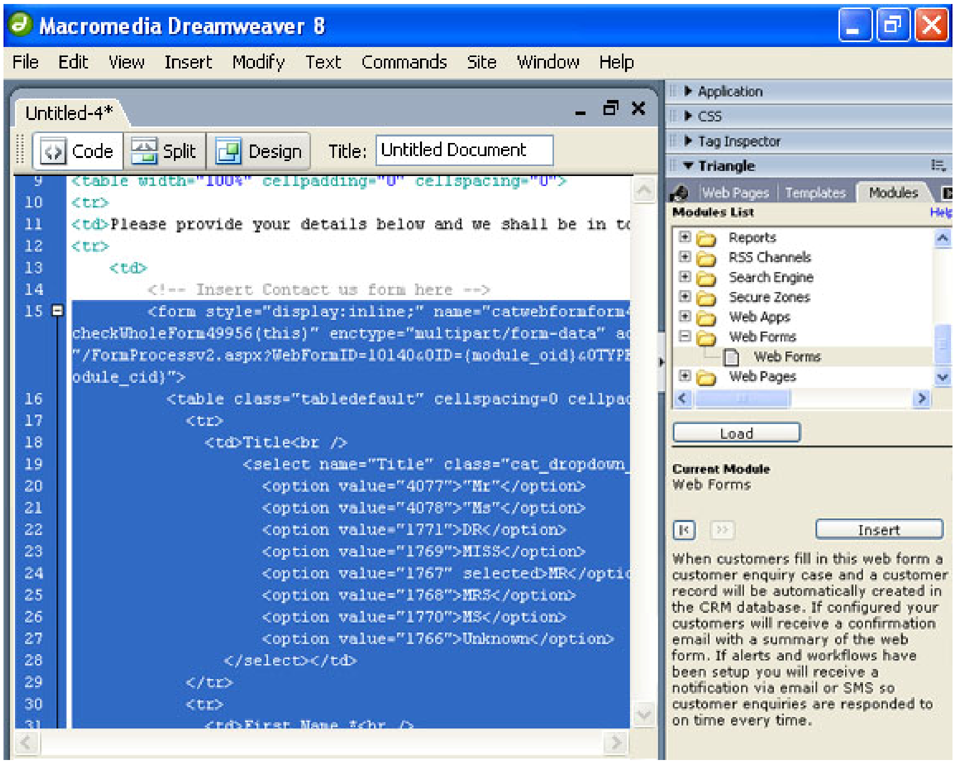


Inserting your Web Form

Switch back to Dreamweaver and **Triangle** and load your Contact Us web page via the **Web Pages** tab. Go to the **Modules** tab and select **Web Forms**. Click **Load**. Select the contact us web form that we have just created. Click the next button (**>>**) **twice.**



Select where **you left your note to insert a web form** on the web page, and click **Insert**. You can now completely **customize** the web form including re-arranging of the fields and using our style sheet classes.



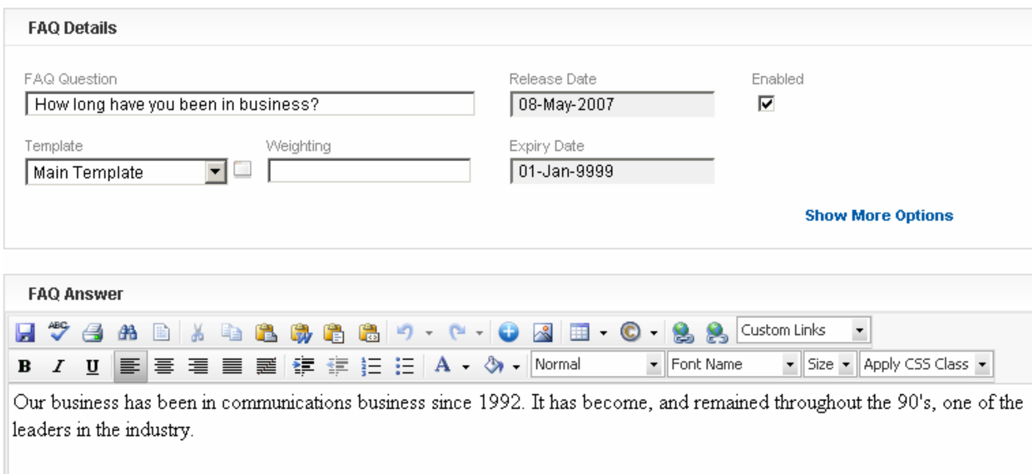
Go back to the web pages tab and click **Save & Publish** when you are happy with the web page and your web form.

6.8. *Create a Customer Self-Help page with FAQs*

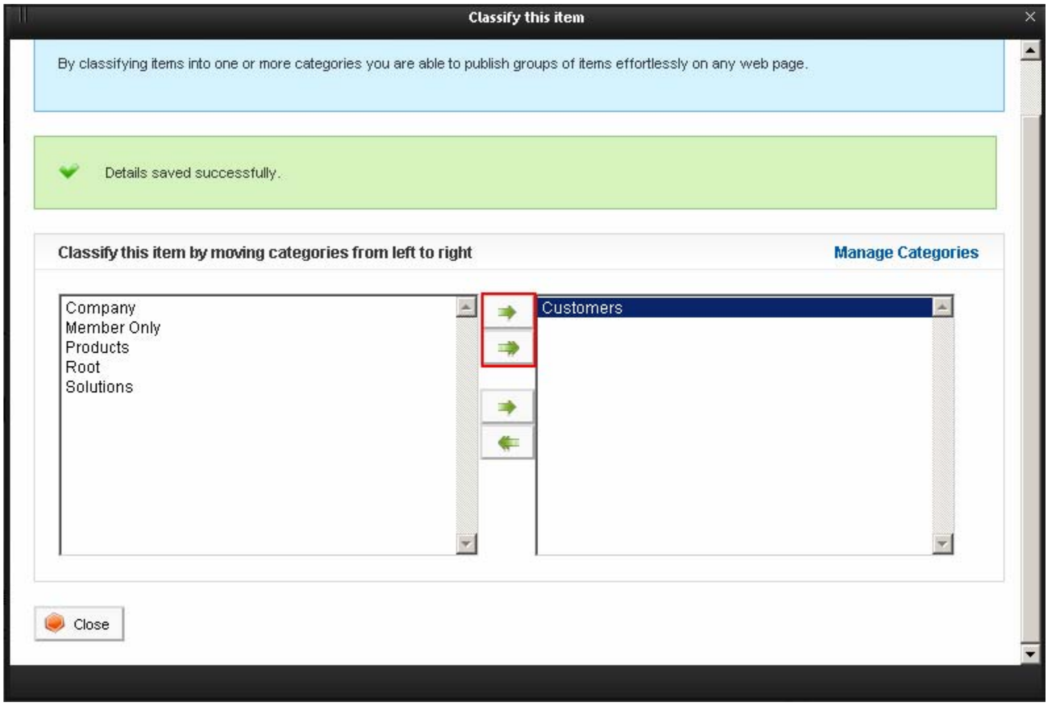
Adding FAQs

To save our customer's time, we want to build a database of FAQs to help them find answers to their questions faster. We'll start by adding a few relevant FAQs to the system. According to our **Site Matrix** we wanted to create an FAQ database of questions on the **About Us** page. So we'll create some FAQs that tell our customers more about us and answer their questions before they have to ask us.

Do this in the web-based Administration under **Modules -> FAQs**. Click **Create a New FAQ** and then enter your question e.g. "How long have you been in business". Now go to the **Editor** tab and fill in the **answer** to the question.
Click **Save** on the bottom of the screen when done.



You can also **classify** the FAQ so that you can more easily publish groups of related FAQs together. You can classify FAQs by clicking on the **Classify this item** button in Action Box.



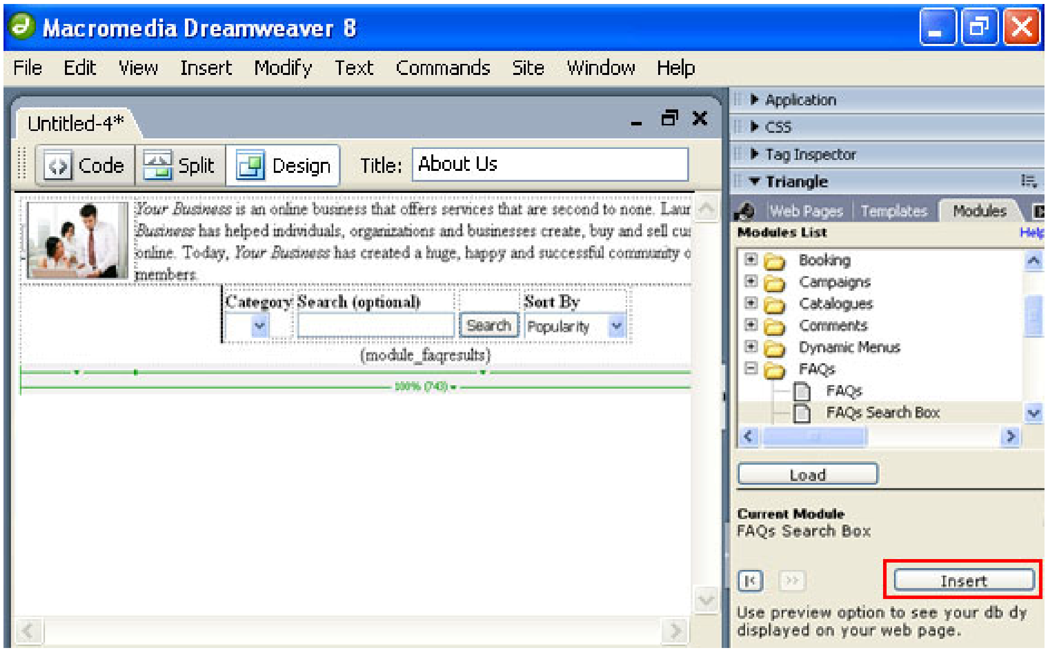
Now repeat the above for each FAQ you want to add.

<u>FAQ Search</u>

Now that we have created some FAQs, we'll implement **search and browse** to allow our customers to easily find answers to their questions. We can easily do this within **Triangle**.

According to our **Site Matrix** we want the FAQ Search to be inserted on the **About Us** page. Go to the **Pages** tab and click on the About Us page, the click **Load Live**. Now find the note you left earlier where the FAQ Search should go and place the text cursor there.

Click on the **Modules** tab, and select **FAQs.** Click on **FAQs Search Box** and click **Load.** Click **Insert.**



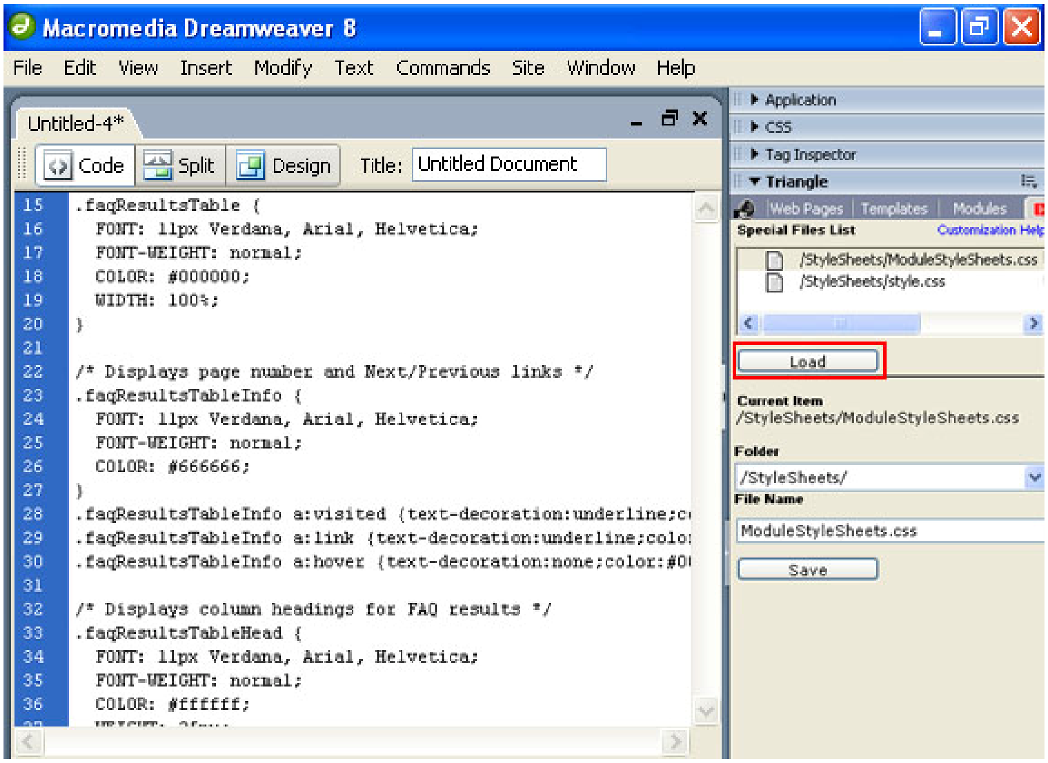
Customizing FAQ Appearance

FAQs have a default layout and look and feel which can be used out of the box. However you may want to customize them further. The how-to to customize FAQs is discussed in a later topic.

Customizing the FAQ Search with CSS

Many of the advanced features of the system can be customized using CSS. The system has a **style sheet class** specifically used for this called **ModuleStylesheets.css**. It is in the **StyleSheets folder** of every site – you can download it via **FTP** or on the web admin using **Content -> File Manager.**

We can customize various aspects of our FAQ search by modifying this file.


Macromedia Dreamweaver 8
File Edit View Insert Modify Text Commands Site Window Help
Untitled-4*
Code Split Design Title: Untitled Document
.faqResultsTable {
FONT: 11px Verdana, Arial, Helvetica;
FONT-WEIGHT: normal;
COLOR: #000000;
WIDTH: 100%;
}
/* Displays page number and Next/Previous links */
.faqResultsTableInfo {
FONT: 11px Verdana, Arial, Helvetica;
FONT-WEIGHT: normal;
COLOR: #666666;
}
/* Displays column headings for FAQ results */
.faqResultsTableHead {
FONT: 11px Verdana, Arial, Helvetica;
FONT-WEIGHT: normal;
COLOR: #ffffff;
Application
CSS
Tag Inspector
Triangle
Web Pages Templates Modules
Special Files List
Customization Help
/StyleSheets/ModuleStyleSheets.css
/StyleSheets/style.css
Load
Current Item
/StyleSheets/ModuleStyleSheets.css
Folder
/StyleSheets/
File Name
ModuleStyleSheets.css
Save

6.9. Create Literature Items

When we wrote our Site Matrix we wanted a specific secure area for our members to download certain documents. We do this using Literature.

<u>Setting up: Classifying Literature</u>

You should **classify** your literature to enable you to **publish related literature items** in groups on various pages. We want to create a **special zone for members to download documents.**

So in this case we would need to create a category called "**Member Only".**

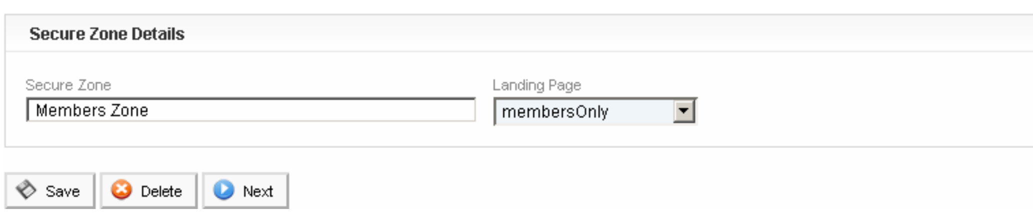
- We do this in **Admin -> Manage Categories**
- Click **Create a new top-level Category** and enter the **Category Name**
- Click **Save.**

<u>Setting up: Secure Zones</u>

We want to create a **special zone for members to download documents.**
So we need to create a new **Secure Zone** for our members to log in to.

So in this case we would need to create a Secure Zone called "**Member Zone".**

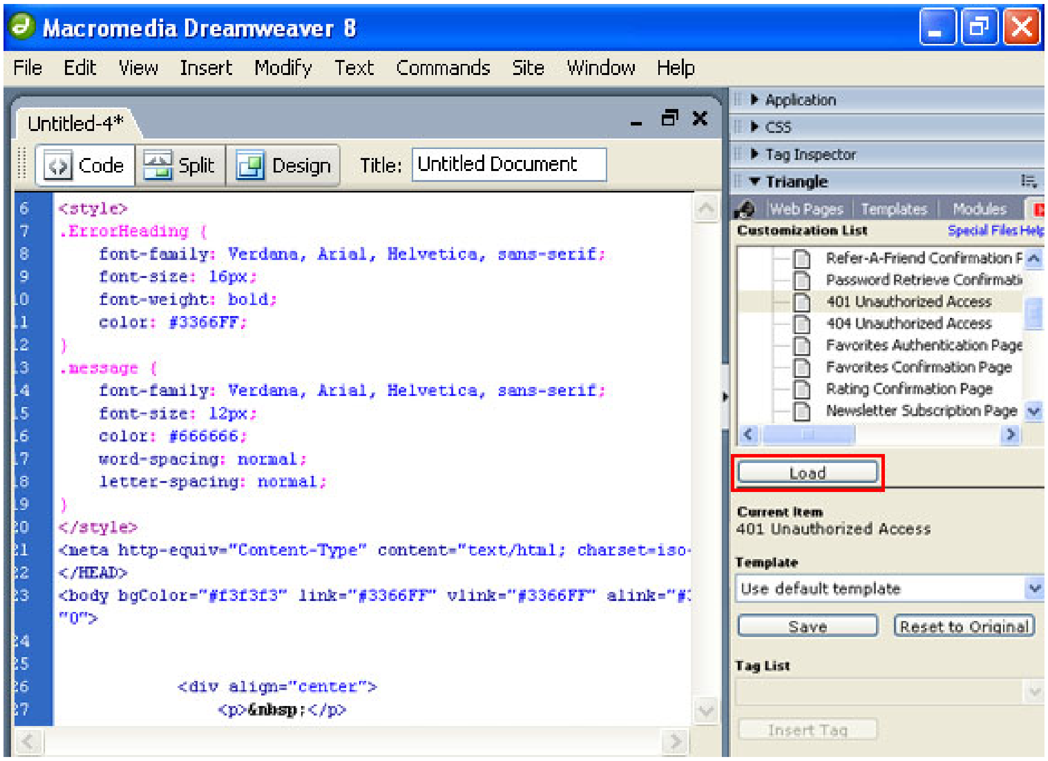
- We do this in **Website -> Secure Zones**
- Click **Create a new Secure Zone** and enter the **Secure Zone name**.
- Make the **Landing Page** the **Member Only page**, according to our Site Matrix
- Click **Save**.



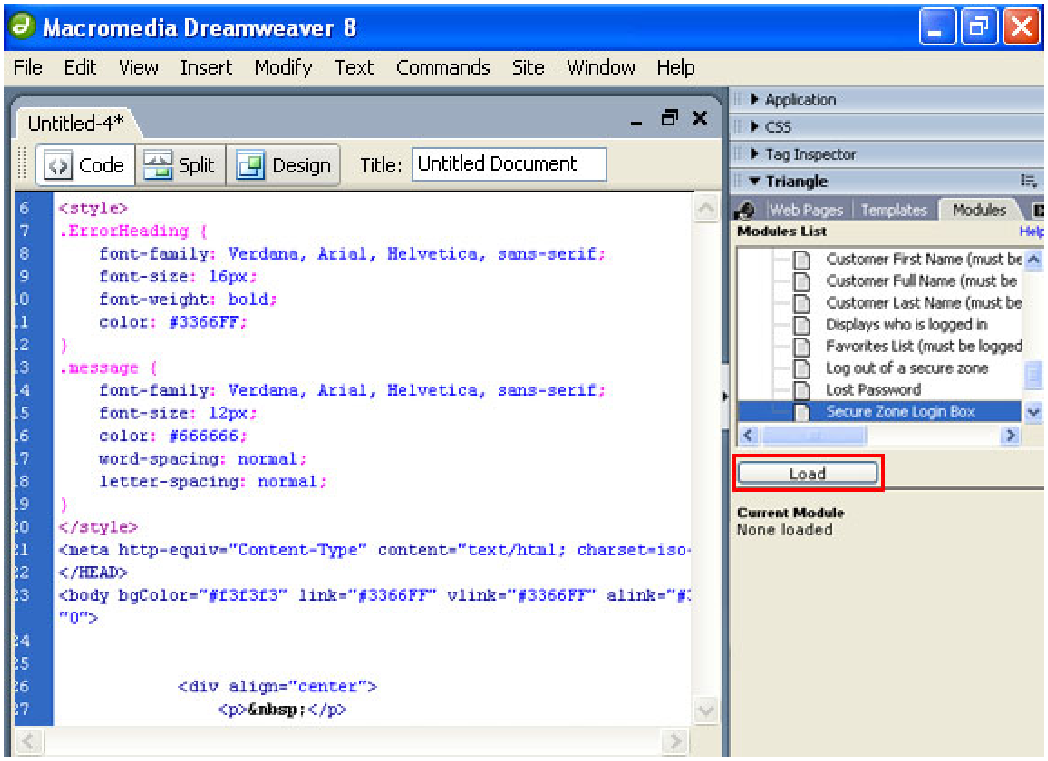
According to the Site Matrix we prepared, one of your web pages should be secure – the **Member Only Page**. Go to **Website -> Web Pages** and then select your **Member Only** page. Click on **Make Web page secure** in the **Action Box** and assign this page to the secure zone we created. This web page is now secure!

Now we need to give our members a way to log in to the secure zone. Let's put this on the **access denied page** so our members can log in.

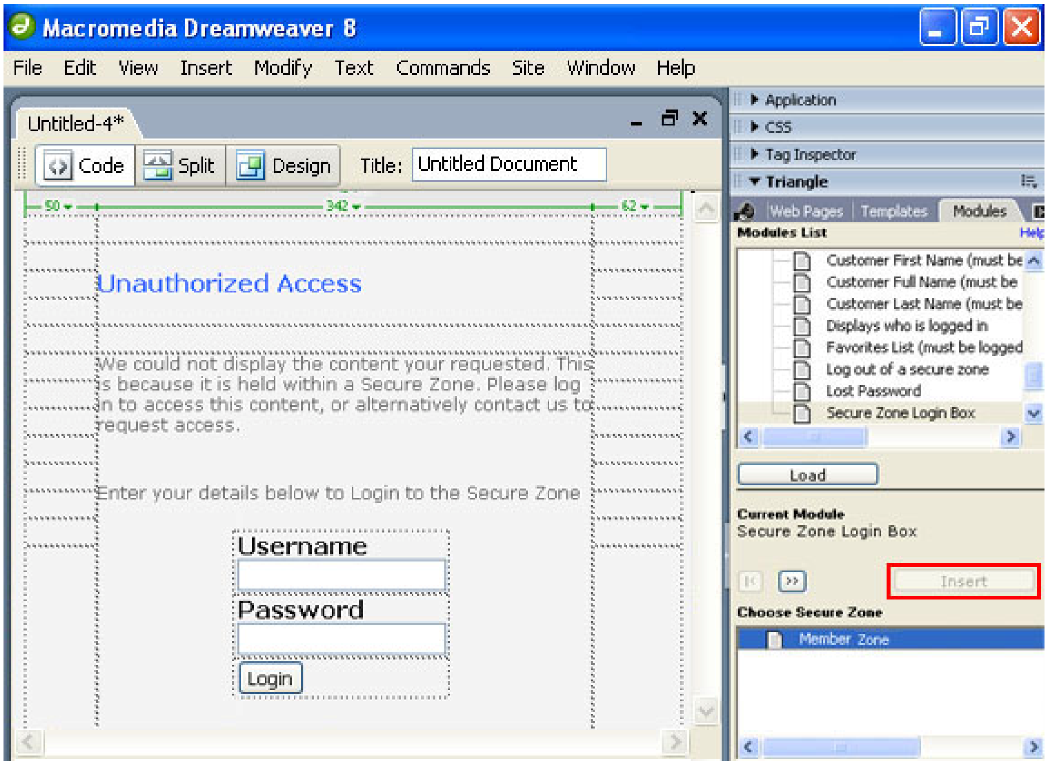
In **Triangle** click on the **advanced tab** and click **System Messages.** Select **401 Unauthorized Access**. Click **Load**.



Now we add the secure zone log in box to this page, via the **Modules** tab. Select **Secure Zones** and select **Secure Zone Login Box**. Click **Load.**



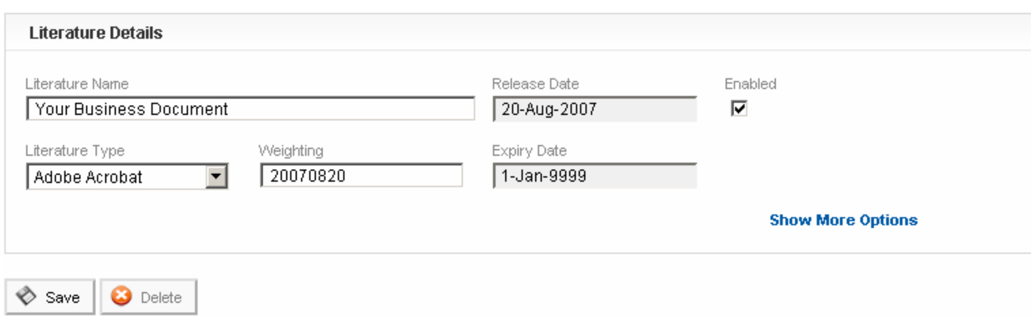
Now select your **Member Zone**. Click the next (**>>**) button. Select where on the web page you want to insert the log in box on, and click **Insert.**



So far we've created a secure web page to place documents on. And we added a login box so visitors can login to this secure zone. Now we are ready to add documents!

Adding Literature

We upload our documents via the web-based Administration, under **Modules -> Literature**. Click **Create a new Literature Item** in the Action Box and enter in a name for the literature and any other details as appropriate. Click **Save**.

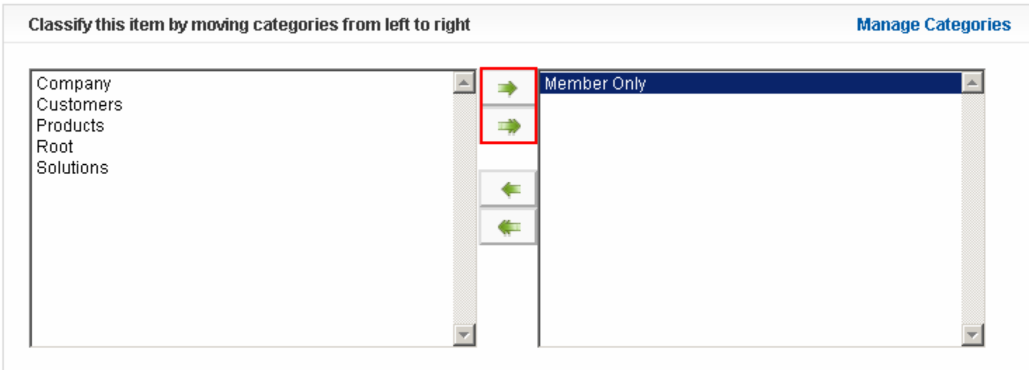


You can control how you wan to display your literature on the same page by using the **Weighting** field. The highest number is displayed first.
If you want to display your literature according to date, use the the following format: 20070820 for 20-Aug-2007. This way the latest literature will be dispalyed first.

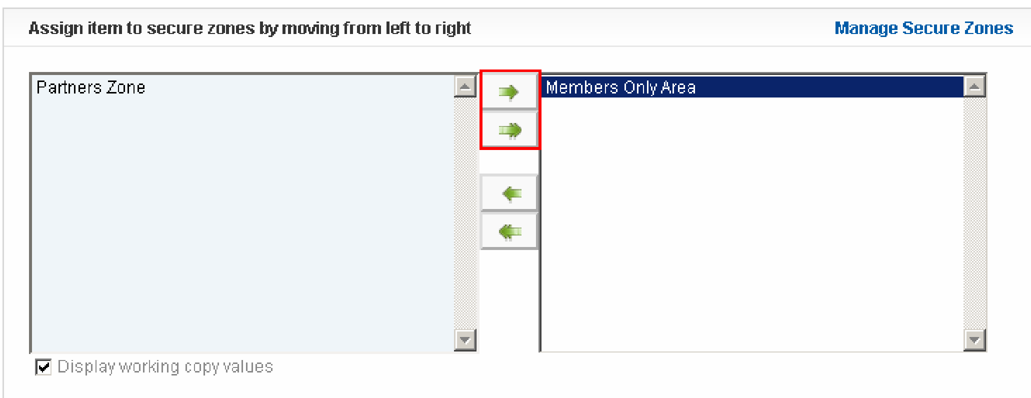
Click **Upload Liteture** in Action Box to upload your document. Select your document for this literature item and then click on **Upload**. Repeat this process for each document.

To insert this literature item into a web page using admin interface, click **Add Literature to a web page** button in Action Box.

Click on **Classify this Literature** in the Action Box to add this document to the **Member Only** classification we set up earlier.



Click **Make Literature Item Secure** to make your documents secure so that only your members can read them. Add them to the **Member Zone** you just created.



Inserting the Literature Items on our Site

Now we add the documents to a page. In **Triangle**, under the **Web Pages** tab, load your **Member Only page**.

- Now under the **Modules** tab select **Literature** and click **Load.**
- Choose “All Items in a Category Classification”.
- Click Next (**>>**), then select your **Member Only** category you created earlier.
- Click Next (**>>**), and then click **Insert**.

Go back to the **Web Pages** tab and select **Save & Publish**.

6.10. Finishing the site

To finish your site, you need to set a landing page for your site. This is the first or the default web page that is displayed to your visitors when they visit your site. In **Triangle** choose the **Web Pages** tab. Choose the web page you want to be your start page and select **Load**. Check **Start Page** and click **Save & Publish**.

Now you've finished the content side of your site – well done!

7. BUILDING AN ONLINE BUSINESS: SETTING UP FOR BUSINESS

7.1. Introduction

It's important to remember that we are creating Online Businesses, Not Websites. That means that setting up our content is only the first half of the equation – we also have to set up and tune the engine that runs our business!

Setting up for business involves several steps, including:

- Configuring who has access and permission to modify your online business
- Organizing your content and processes to suit your business structure
- Configuring business and customer service processes
- Customizing your contact database to suit your business's customers
- Importing existing data on customers and products
- Going live and setting up email accounts.

7.2. Users, Roles and Permissions

Users are people in your business who will log in and use the system. They may be designers, content writers or sales people accessing your site's Administration interface. **Roles** are groups of **Users** that share similar responsibilities and have similar requirements when using the system. **Permissions** are assigned to **Roles** to grant or deny access to various system features. This then defines what the Users in that Role are able to do.

For example, your business might have two sales people, John and Mary. Their main responsibilities are:

- To manage new customer leads
- To ensure existing customers are happy

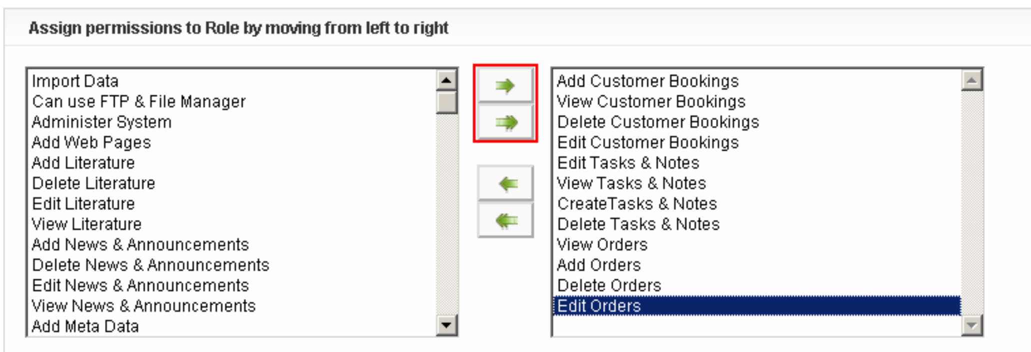
We would create a Role for them called **Sales**. This role would then be granted **permissions** to **access**, **view**, and **edit** all the customer details in the customer database. We would also deny permission to edit any content on the web site, as we don't want John or Mary to make any accidental changes to the web site.

We then simply add two users to the system, John and Mary, and add them to the Role Sales.

Create a Role

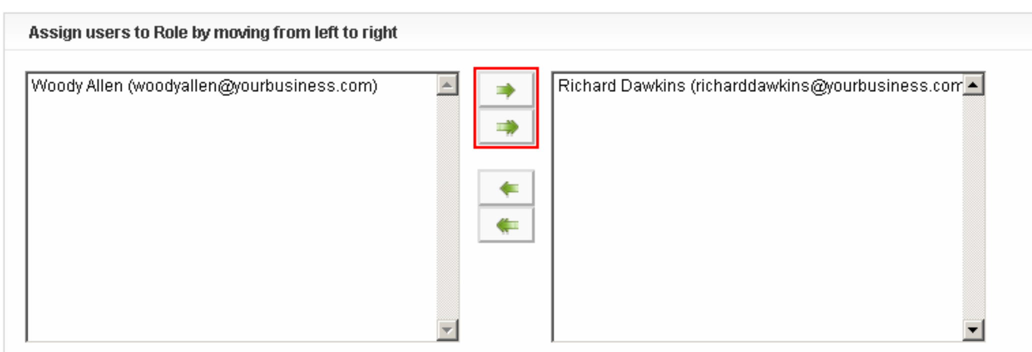
To create a Role, go to **Admin -> Manage Roles**. There are some predefined Roles in the system you can customize and use if you desire. Otherwise, click **Create a New Role**, give the role a **Name**, then click **Save.**

Click on **Assign Permissions to this Role** button in the Action Box to grant permissions to that role. Move the desired permissions from left to right.



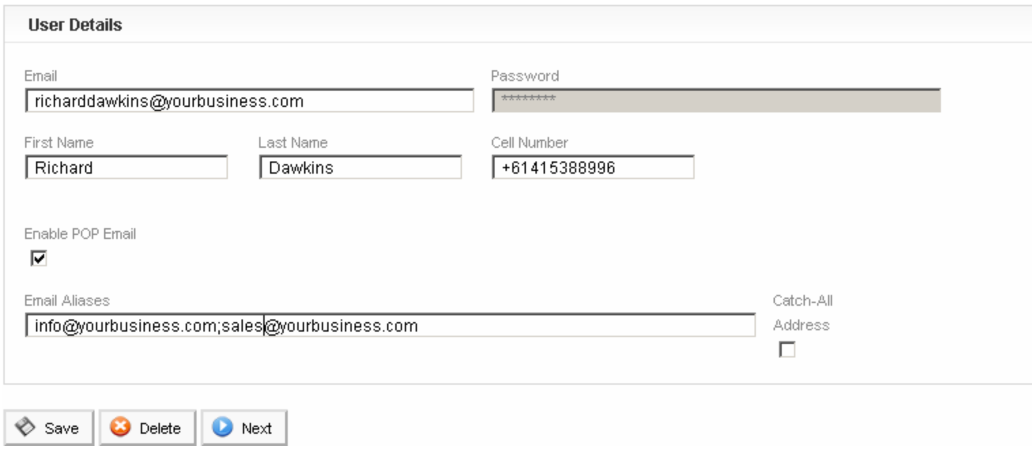
Managing a Role

You can view who is in a Role by clicking onto **Assign users to this Role**, and you can change the permissions of a Role by clicking onto **Assign Permissions to this Role** button.



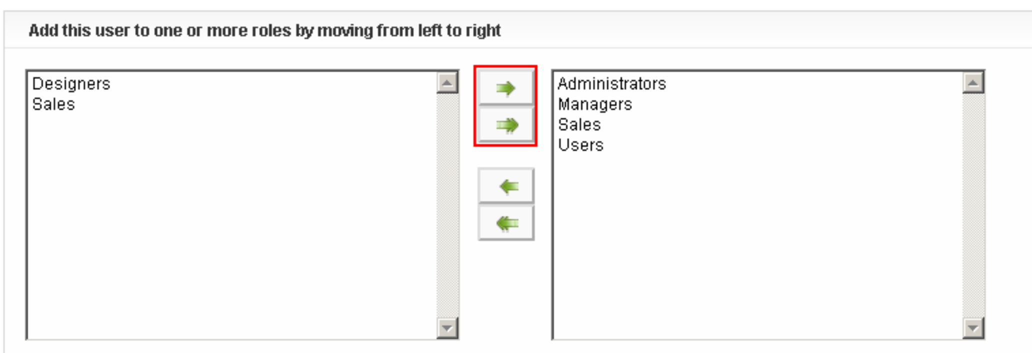
Creating a User

You can create a user in **Admin -> Manage Users**. Click **Create a new User**, and enter in the users details.

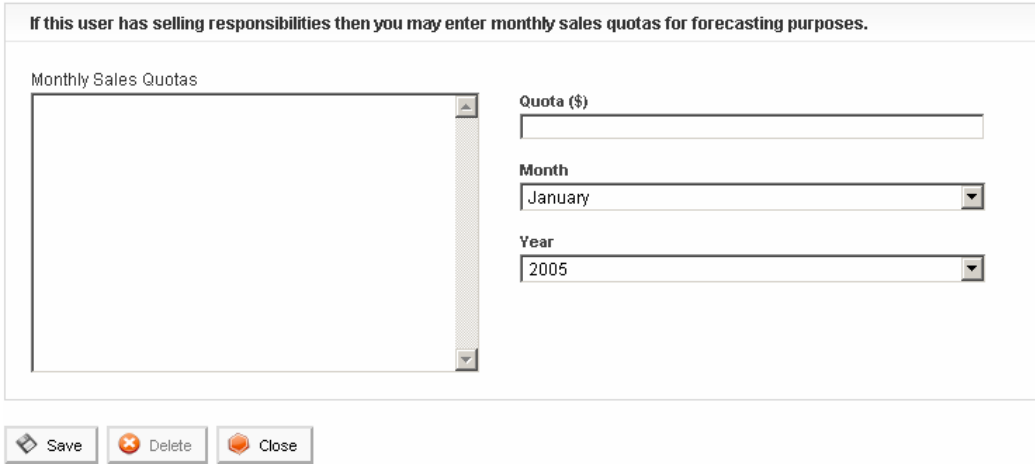


Please note the **Cell Number** must be filled in if SMS notifications are being used for this user. **Enable POP Email** should be checked if you are using this service for email. See the later section on setting up Email for more information.

Now you need to add the new user to the appropriate roles. Click on **Assign User to a role** button, and add user to a role by moving the appropriate roles from left to right.



If you are using the opportunities and forecasting features built into the system then you can enter sales quota for each sales staff and match this with customer sales opportunities. This enables you to track your sales staff's performance on a month by month or quarter by quarter basis. Click on the **Set sales quota for User** button to add quotas for this user.



Managing Users

You can add and remove users from **Roles** at any time, by clicking on the **Assign User to a Role** button. Please note **you should never remove yourself from all the roles**. This will mean you do not have access to the system and you will effectively lock yourself out of the system.

7.3. *Adding your URL*

When you are ready to go live, you must add your URL to the system. To do this using our DNS service, simply follow these steps.

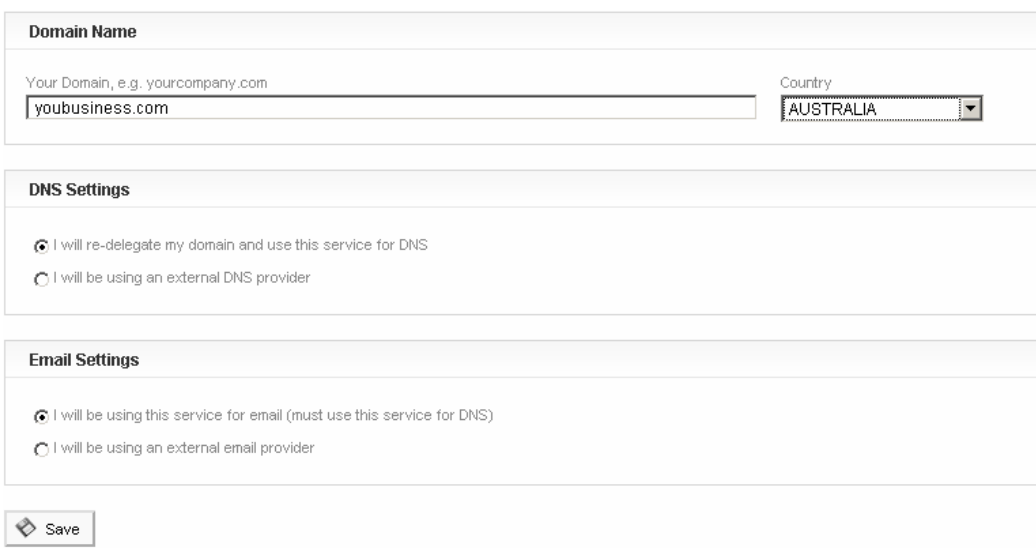
1. Go to Admin -> Manage Domain Name

2. Enter your domain **without www**. For example **yourcompany.com**. The system will set up **www.yourcompany.com** automatically.

3. Select the option **I will re-delegate my domain and use this service for DNS**.
    a. Please note, while you can select to use an external DNS provider, this is an advanced topic and is generally not recommended unless you have special DNS requirements.

4. Select **I will be using this service for email**.
    a. Alternatively you can use an **external email service**. To do this you must find out your **mail server address**.

5. Go to your domain provider and select to re-delegate your domain. This may require some assistance from the registrar where you registered your domain. Your name server details should be entered as follows:
    a. **Primary** name server: **ns01.businesscatalyst.com** (203.134.157.116)
    b. **Secondary** name server: **ns02.businesscatalyst.com** (203.134.157.117)



7.4. Setting up User Emails

Email can be set up for a user in just a few clicks. However there are a few requirements in order to set up email.

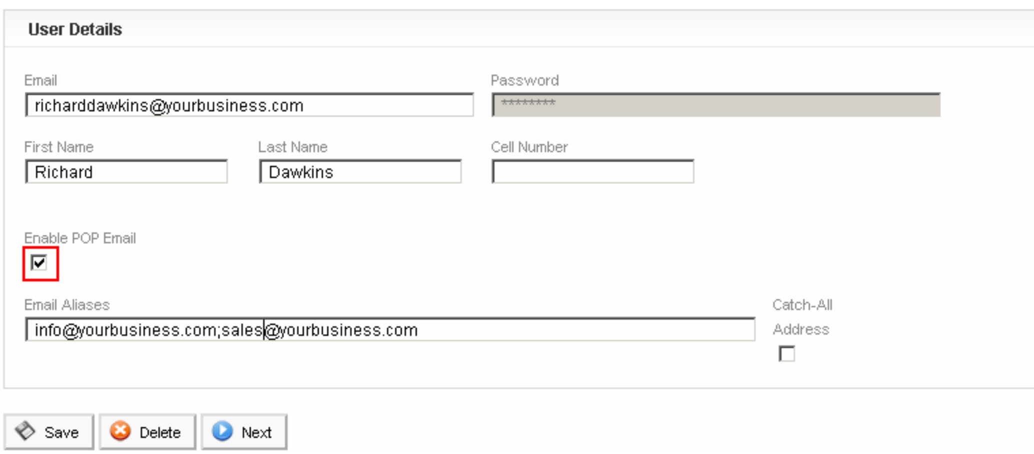
- You must use our DNS to host your domain on. When setting up your URLs, you enable this by nominating you will use this service for DNS and this service for Email. See the previous section for details on this.

- The person who you want to use email for must be a **User** in the system. Within the system, an Email account (or mailbox) equates to a **User**. You can't give non-users email accounts, although you can control their permissions so that they don't have access to any other parts of the system.

- The user's email address must end in **@yourdomain.com** where **yourdomain.com** is the URL you've set up in **Administration->URLs**

<u>Enabling Email</u>

Go to **Admin -> Manage Users** and click on the user you wish to enable email for. Check the check box **Enable POP Email**.



Using the **Email Aliases** text box you can add extra email addresses that should be directed to this user's mail box. For example, the user's real email address might be **john@yourdomain.com**. You might also want John to receive **info@yourdomain.com** and **sales@yourdomain.com.** You would add these to the **Email Aliases** text box.

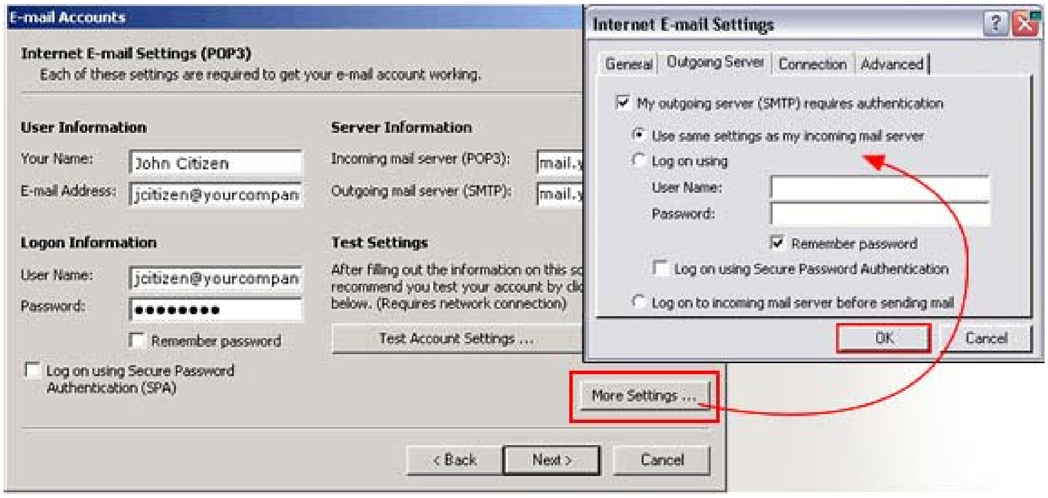
The **Catch All Address** check box indicates that any email address that

- Isn't another user's email address
- Isn't another user's email alias
- Does end in **@yourdomain.com**

should also be redirected to this user's mail box. Usually the primary business owner would enable this option.

Sending and Receiving your Email through an email client

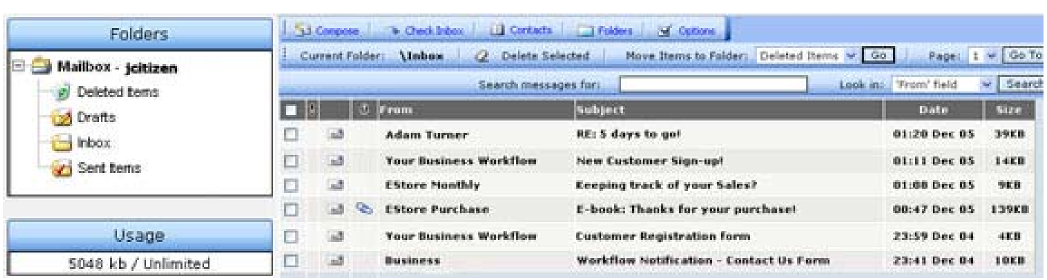
You can send and receive your email with any email client. Screenshots provided are for Microsoft outlook. Your account should be set up as follows:



- Your **username** is the **email address** that you use to log in to the system
- Your **Password** is the **same as to log in to the system**
- Your SMTP server (to **send** mail) should be **mail.yourdomain.com** where yourdomain.com is your businesses URL.
- Your POP3 server (**incoming** that receives mail) should also be **mail.yourdomain.com** where yourdomain.com is your businesses URL.
- Your SMTP (**outgoing** that sends mail) server **requires authentication**. So you should set up your outgoing server to authenticate using the same username and password as to log in to the system.

Using Web Mail

You can access your email online, any time, and any where by using our online **web mail** interface. You can get to web mail from **Home -> Web Mail.** Or by clicking on the **Web Mail** tab when viewing the dashboard after you have logged in via the web-based Administration interface.



To go back to managing your online business, click the top left hand corner of the screen.

7.5. *Your Business Taxonomy: Categories*

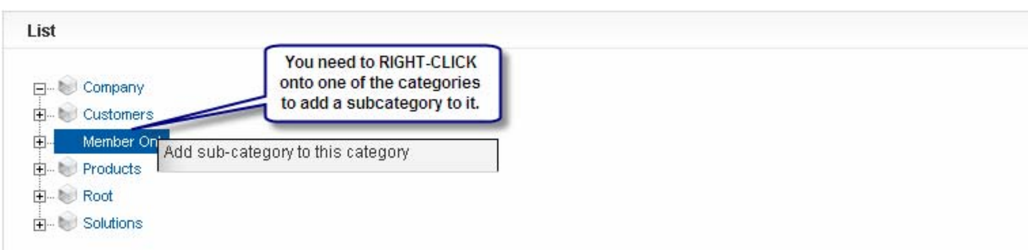
Categories are essential to help you organize information that relates to your business. The system allows you to create hierarchies of categories that you can use to easily classify or categorize content such as announcements, FAQs and more.

Common categories for a typical business could include:

- Products
- Support
- Company
- Customers

You can customize your categories to suit your business's needs. Do this in **Admin -> Manage Categories.** To create a new top level category, click on **Add a new top-level Category**. Simply give the category a **Name**, click **Save** and you are done!

To create a new sub category under another category, right-click onto the parent category first, and then click on **Add sub-category to this category** link and then simply give the sub-category a **Name**, click **Save** and you are done!



7.6. *Business Processes and Workflows*

Workflows allow you to automate and streamline your business, including your customer service, enabling you to notify system users of various events, and require approval or input at certain steps of the process.

A Workflow is a series of steps that are triggered by various events, such as:

- A customer enquiring online
- A customer placing an order online
- A customer making a booking online
- A change made to a web page's content (by a user)

Each Workflow step has:

- A group of people (a **Role**) that is notified via **Email** or **SMS**.
    - One of these people may need to **approve** the step before the workflow proceeds to the next step
- A period of time that the task should be completed within (**Task Duration**)
- A period of time that should elapse before reminding the Role to complete the task
- A period of time to wait before **escalating** the issue, after the **Task Duration Expires**.
- A group of people (a **Role**) that the task is escalated to after the escalation grace period expires.

Creating a Workflow

To create a workflow, go to **Admin -> Manage Workflows**, and click **Create a New Workflow**. Give the workflow a **name** and click **Save**. If you would like this workflow to be triggered when a new order is made via the Online Shop, check the **Orders** check box.

Click on the **Add steps to this workflow**, and start defining the workflow steps. After giving the step a **Task Name**, select the **Role Responsible** – who should be notified for this task. Then select a Role for **Escalate To Role,** and how the role should be notified – via SMS or Email.

If the task requires someone to take action and approve the step as complete, ensure **Must Approve** checkbox is selected. If it is checked, then you must decide on your **Task Duration**, **Remind Before Expiry** and **Escalate After Expiry**. These

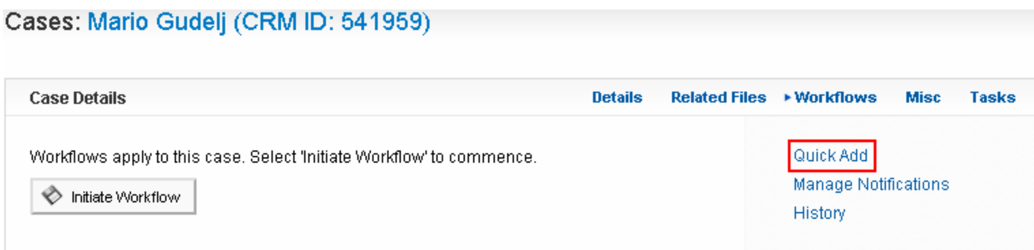
time periods help you manage service level agreements (SLAs) with customers, and also help you manage your internal business processes.

If you check **Also Send a Workflow Notification To** then you can enter some email addresses of people **external to the system** (i.e. non-users). Who should be notified of the event that triggered the workflow.

Finally, you can **Send Workflow Message to Customer**. This will email the content that you enter to the customer **that is associated with the case**. This is not automatic – you need to add the customer to the 3rd party notifications list. This is done under the customer's case. But once you add the customer to the 3rd party notifications list as your workflow progress through its steps, the customer is notified with a custom message. For example a finance company who is approving a loan application for a customer may use this to keep the customer in the loop as the loan approval process progresses internally. Customer may receive the following emails:

- We've received your loan application
- We've reviewed that all required information is there
- Loan currently with credit department
- Loan approved by credit department now forwarded to loan manager
- Your loan has been approved.

Simply click on **Quick Add** as in the screenshot below.

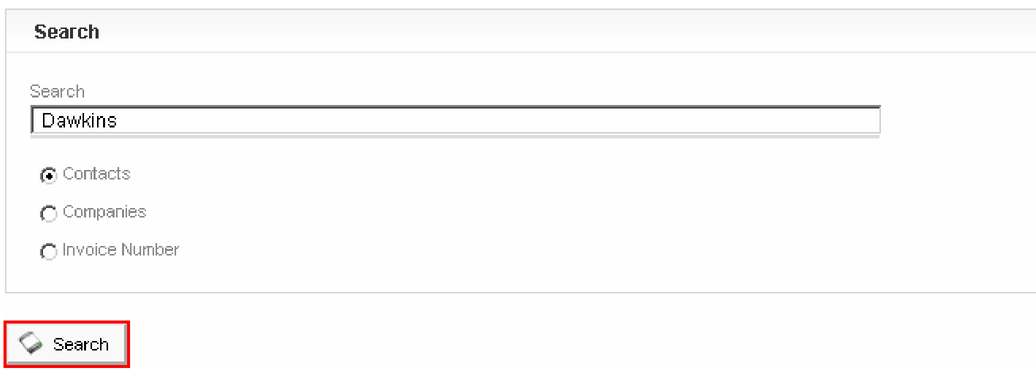


7.7. *Your Customer Database*

Your customer database is integrated into every facet of your website. It is constantly growing every time customers make enquiries, subscribe to your newsletters or purchase products via your online shop. Your customer database gives you a 360 degree view of all of your customers' activities. Customers can be created via three methods:

1. Manually, by going to **Customers -> Create a New Contact**
2. From an existing database, using the **Import** facility under **Admin -> Import Data**
3. Automatically via the web, from web forms, online purchases, bookings and newsletter subscriptions.

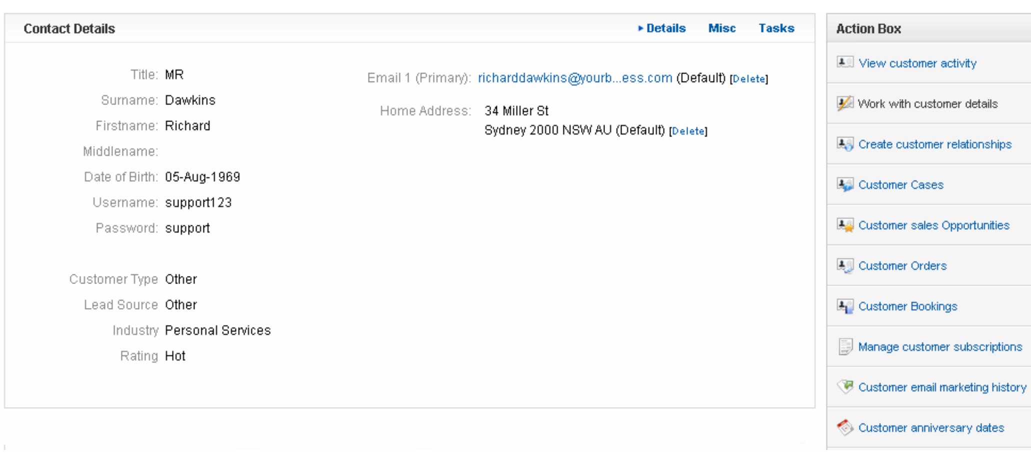
You can either search for customers using **Customers -> Search**.



You can browse through groups of your customers via **Customers -> Customers**.

The customer record allows you to view:

- A **Summary** of that contact's information
- The **Contact** details
- **Relationships** that the contact might have with other contacts and companies
- **Cases** that the contact has listed against their name
- **Orders** that the contact has ordered
- Sales **Opportunities** associated with this customer
- The customer's **Subscriptions** to
  - Email Lists
  - Secure Zones
  - Catalogue Discounts
  - Affiliate Programs
- Any **Anniversaries** that have been registered against the contact record.
- Statistics on the customer's behavior on previous email **Campaigns**
- **Bookings** that the customer has made



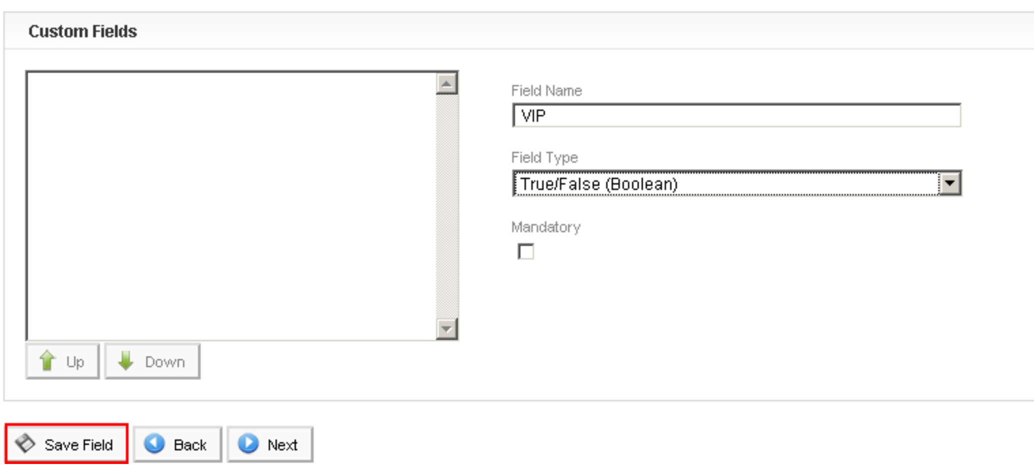
7.8. *Extending the Customer Database*

Every business is unique, and every business's customers are slightly different. You can customize your customer database to capture additional information relevant to each customer. That means you can extend and customize just about any part of the customer database including Contact, Company, Cases, Orders, Bookings and Opportunity tabs.

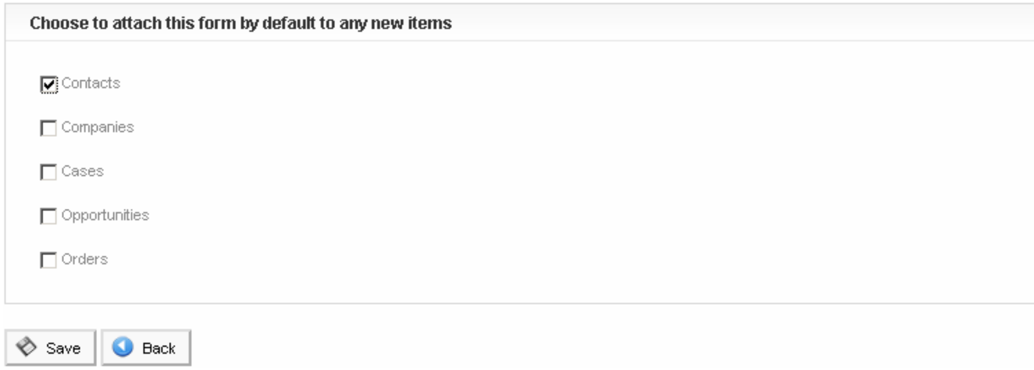
Creating Custom CRM Forms

For example, some of your customers might be VIPs. So you want to easily mark some customers as VIP when you are viewing or editing their records. To do this first go to **Admin -> Extend Customer Database**. Click **Create a new CRM Form**, then enter the CRM Form's name and click **Save.**

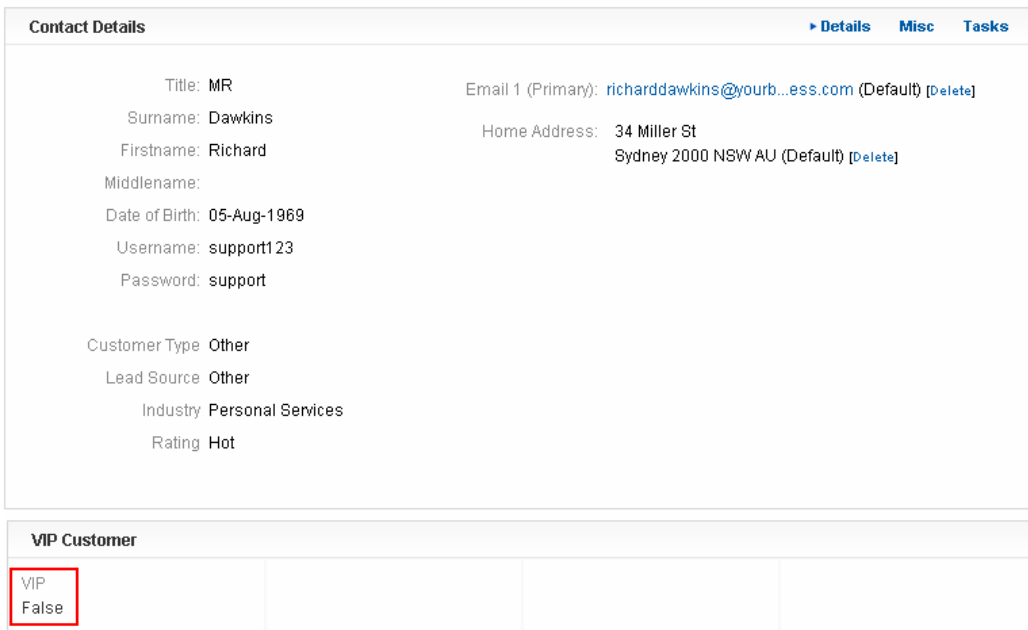
Click the **CRM Form Fields** button**.** In this case, we want to add a True/False field called VIP. Enter this and click **Save Field**. Note that you can create any type of field including lists and dates, just as you did for web forms.



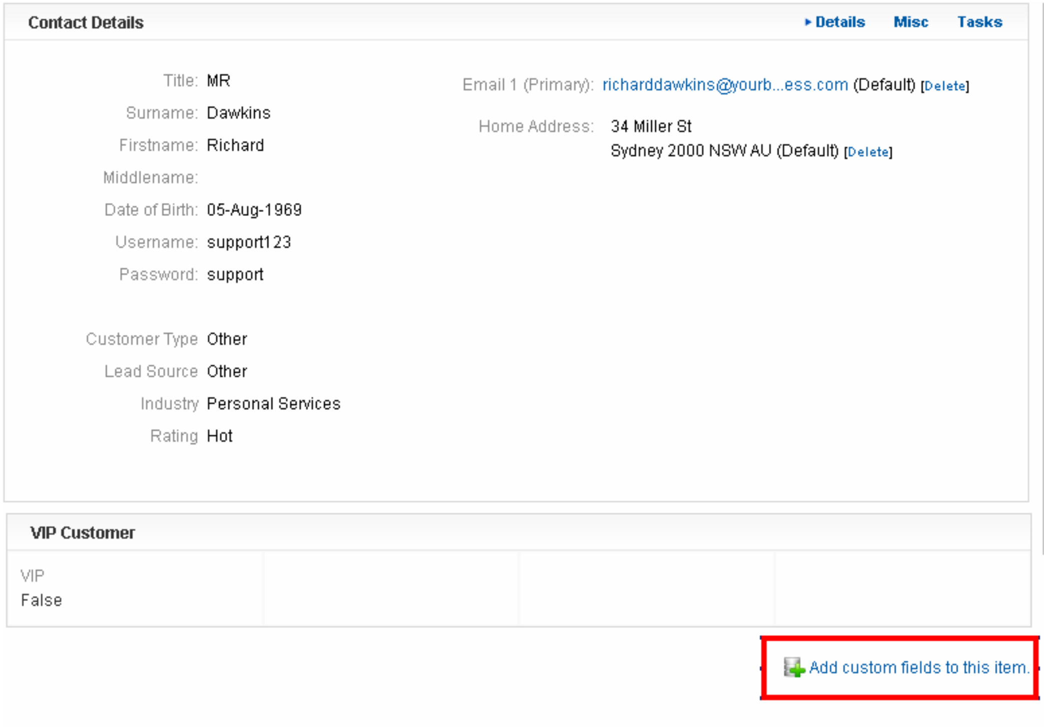
Click on the **Setup Default Use** button. Select **Contacts** to indicate that new contacts should have this new CRM form attached by default. You can also select other items that should have this form attached by default, if desired.



Now each time you add a new customer you will have this field appear in the **Contact** tab under their customer record.



You can also **add a CRM Form to a Customer on an ad-hoc basis.** You may want to add this form to your existing customers. You can do this by clicking on **Add custom fields to this item** on the bottom of the page. Select your VIP form and you are done.



The same procedure applies for adding a CRM Form to most other actions in the Action Box.

7.9. *Importing Customers*

One of the important steps in setting up your online business is to import your existing customer database. This system allows for a basic or a detailed import. It's important to familiarize yourself with these options to ensure the import process is quick and painless.

The basic import allows for the following fields to be imported:

- Email Address (Unique Identifier)
- Title (e.g. Mr, Ms)
- Firstname
- Surname
- Company Name

The advanced option can be used to import and populate more than 30 fields in your customer database. To review the complete list go to: **Admin ->Import Data -> Contacts (Detailed)**.

To import your existing customer database into this system:

- Go to Admin -> Import Data
- Decide whether you wish to use the Basic or Detailed import option
- Download the Import Template File. This is the list of column and the order in which they must appear in
- Export your existing customer database into Excel, CSV or TAB delimited format. If you use an application such as ACT, Goldmine or any other popular CRM package you can easily export your customer database into one of these formats.
- Ensure your columns match those found in the Import Template file. Please keep in mind, even if you don't wish to populate a column, it must still appear in your import file. You can leave the column empty
- Save the file as either CSV or TAB (preferred) format
- Import

<u>Import rules you should be aware of</u>

1. An email address may only ever belong to one contact. That is no two people can share the same email address regardless of import option you choose. Please note that company records however can share email addresses with contacts.
2. In the basic import contact records are identified and matched using the email address. If no email address is provided then the contact is imported but not matched to any existing contacts. Subsequent imports of the same file will create new records for any contact without an email address.
3. If you use the detailed import and chose to use the "Your ID" field, then contacts are matched using this field. When this column is utilized then any contact without an email address can still be matched. Please note that even if you use this column, no two contacts can share the same email address under any circumstances.

Why imports fail

There are two main reasons why imports fail.

1. Your choice of file type can affect your import. For example when in Microsoft Excel you choose to save your file in CSV format the output file will have all your columns separated by a comma(,)

Original File

Email Address	Title	Firstname	Lastname
john@mail.com	Mr	John	Citizen
sally@yahoo.com	Ms	Sally	McDermott

CSV File Output
john@mail.com,Mr,John,Citizen
sally@yahoo.com,Ms,Sally,McDermott

When you use a CSV file you can no longer use commas (,) inside any of your columns. Otherwise the extra commas will appear as extra columns and will affect your import. If wish to use your own commas in your columns then you should save your file as a TAB delimited file. In fact TAB delimited files are the preferred format for the import feature.

2. Your columns must not include any line breaks otherwise your import will fail. When you create your CSV or TAB delimited file each customer record will appear on one line (as shown above). If for example you were to use the Detailed import and the address column included a line break the output would appear as:

CSV File Output
john@mail.com,Mr,John,Citizen,233
Pacific Highway,North Sydney,…
sally@yahoo.com,Ms,Sally,McDermott

The Line Break directly after 233 has pushed the remainder of the columns to a new line. The import feature will treat the new line as a new customer which is incorrect. It's likely that your import will not fail but the data imported will be incorrect.

After you create your CSV or TAB delimited file it's important to reload it into any text editor such as Notepad and quickly view its content to ensure nothing out of the ordinary stands out. Doing this ensures your imports are error-free and painless.

Undoing an import

If you make a mistake during your import you can use the **Undo Previous Import** option to undo it. When you undo the import any contact *created* or *updated* during the import will be deleted permanently. This option should only be used when you are first populating your customer database as you would only be deleting new contacts. To use this feature go to: **Admin ->Import Data -> Contacts ->** and choose **Undo Previous Import** from the action box.

7.10. SEO and your Website

SEO is an important topic of consideration for website owners. Ensuring good SEO practices means a high rank in the search engines which leads to greater number of customers finding their way to your website.

A significant amount of investment has been made in this system in ensuring that the best SEO practices are incorporated to help your site rank higher in the search engines.

Integration with Google, Yahoo and MSN sitemaps

This system is integrated with Google, Yahoo and MSN sitemaps feature. This means that all your content is readily available to the search engines for immediate and ongoing inclusion in their indexes. When you utilize this feature all of your content including web pages, announcements, FAQs, product catalogues, Web App Items, Blogs, literature and more will be added to the search engines.

To enable this feature go to **Admin -> Google/Yahoo/Live Optimization** and click **Enable Optimization** button.

Friendly URLs

All types of content excluding web pages use a system generated URL. Although these URLs are permanent and do not change, it is possible to further customize them to include relevant keywords within them. This approach ensures a greater level of SEO friendliness. You can take advantage of this feature when dealing with Catalogues and Web App items. Please review the relevant chapters in this manual for more information on this feature.

Other SEO information

To ensure good SEO practices all redirects within the system are a **301 Permanent Redirect**.

8. Managing an Online Business

8.1. Introduction

A large part of managing an online business is managing your customers and their actions. The system centralizes all of this information for you, allowing you to easily manage all of your customer interactions through one, central interface.

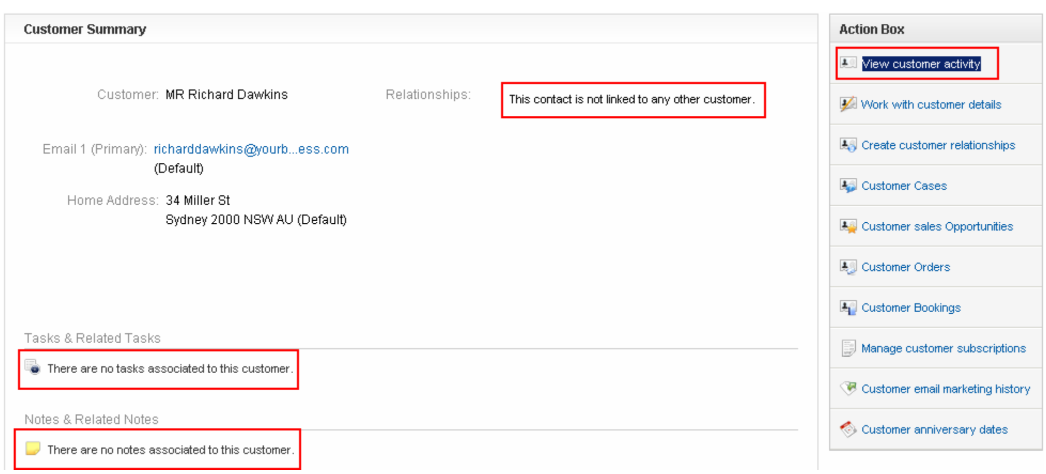
8.2. The Customer Database

The customer database is a centralized view of all your customers which consist of contacts, i.e. individuals and companies. When you view a customer record, you are either viewing a single person's record and all their interactions with you, or a company's record and the company's interactions with you.

The system always provides a 360 degree view of every customer and their past interactions with you. For example when viewing a customer record you can see easily retrieve a list of all the past enquiries. View all the purchases they've made through your online shop. Their subscriptions including those to your email newsletters, secure zone areas, and affiliate programs. You can track or create customer loyalty programs and give specific discounts to this customer when they shop on your website.

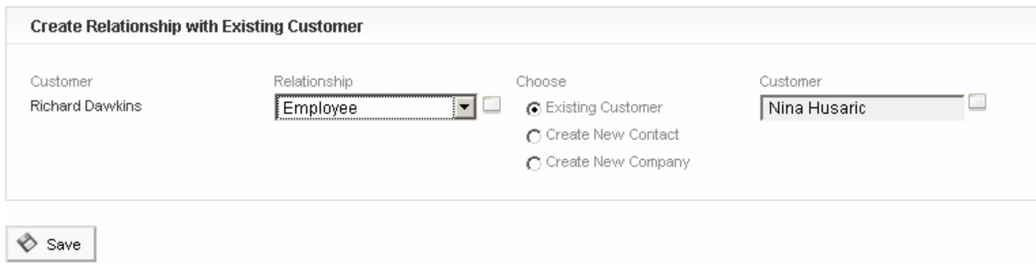
<u>Summary of a Customer's Activity</u>

You can view a record of a customer's activity by clicking on the **View customer activity** link from the **Action Box** after selecting a contact or a company. You can see a list of all the relationships, tasks, notes, Live Feed and other important information for this record.



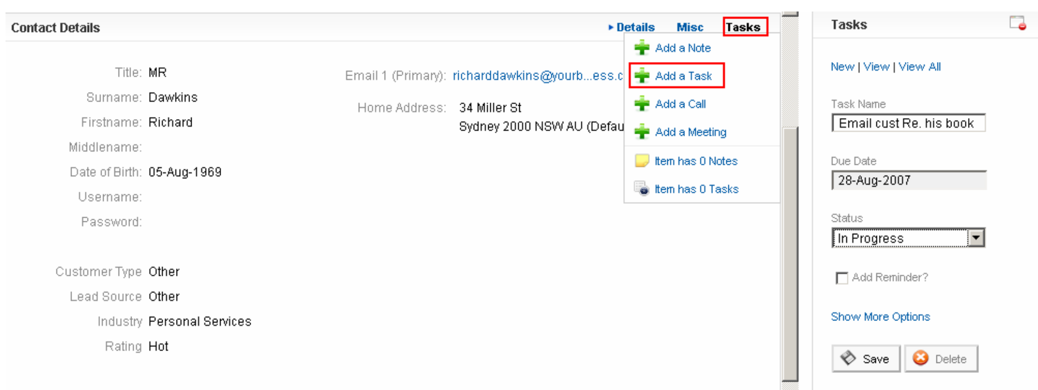
Customer Relationships

The **Create Customer Relationships** link from the Action Box enables you to create relationship between contacts and companies. For example you can create relationships between contacts and contacts, e.g. Jeff is Sarah's Customer; Contacts and companies, e.g. James is an employee of Online Business Pty Ltd; or companies and companies, e.g. Backbone Telecom is a supplier to Online Business Pty Ltd.



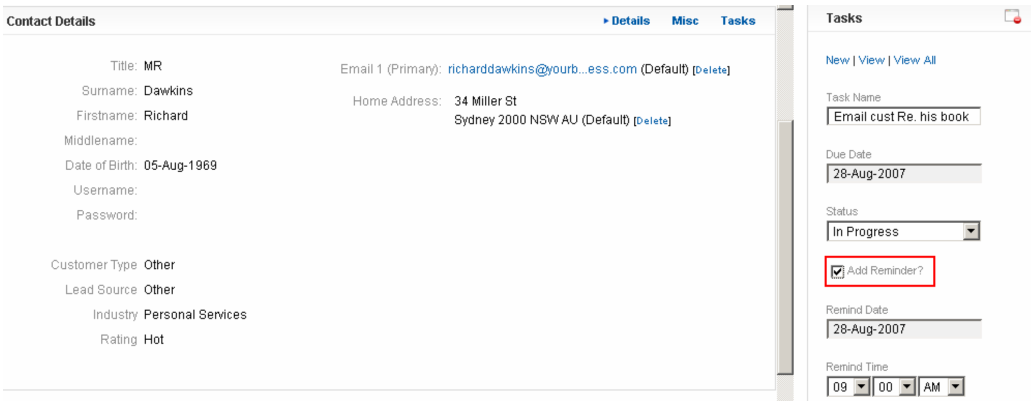
Creating Notes and Tasks

In dealings with customers, at times you may want to leave notes or create tasks for yourself. To do this, click on **Work with customer details** link from the Action Box, hover your mouse over the **Tasks** link and click **Add a Task**. The Tasks link allows you to add a **Note** or add a **Task/Call/Meeting**. Calls and Meetings are simply specialized tasks.



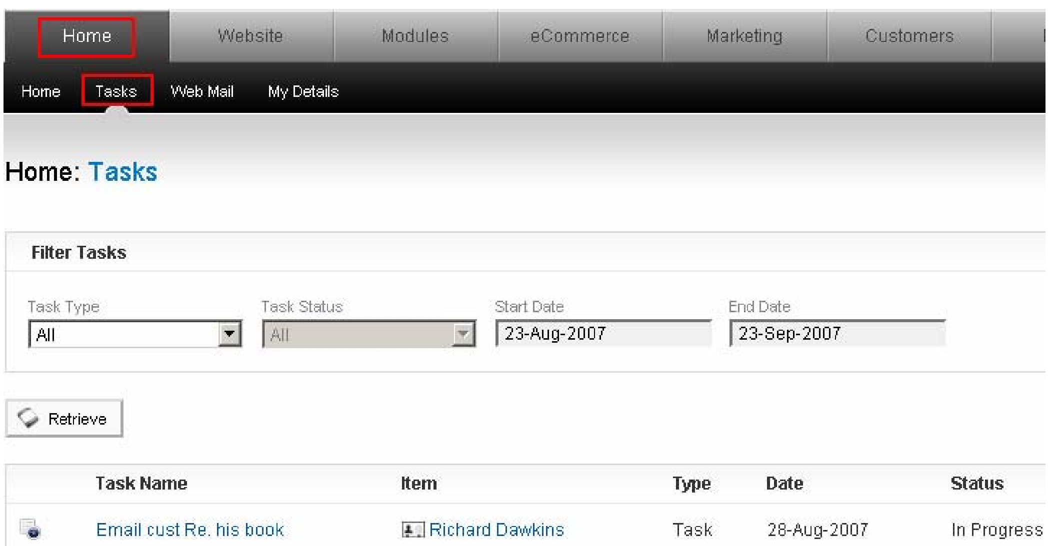
Reminders for Tasks

You can add reminders for Tasks, Calls and Meetings. Simply check the **Add Reminder?** checkbox and select the date and time to be reminded. An email will be sent to you at the time specified to remind you.



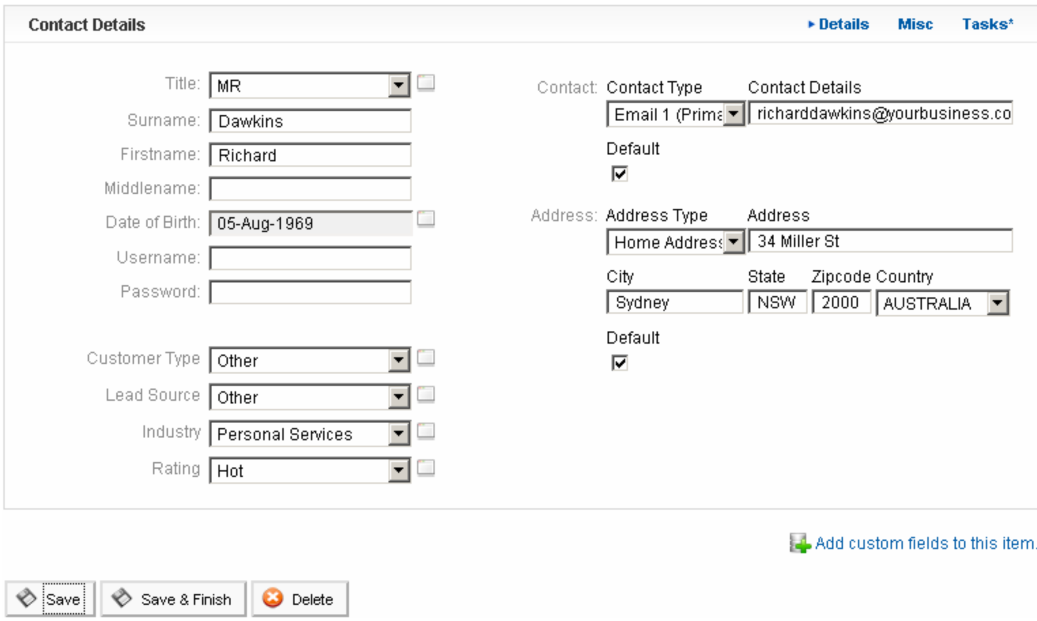
Viewing All Tasks

You can view all tasks and retrieve tasks for a time period under **Home -> Tasks**.



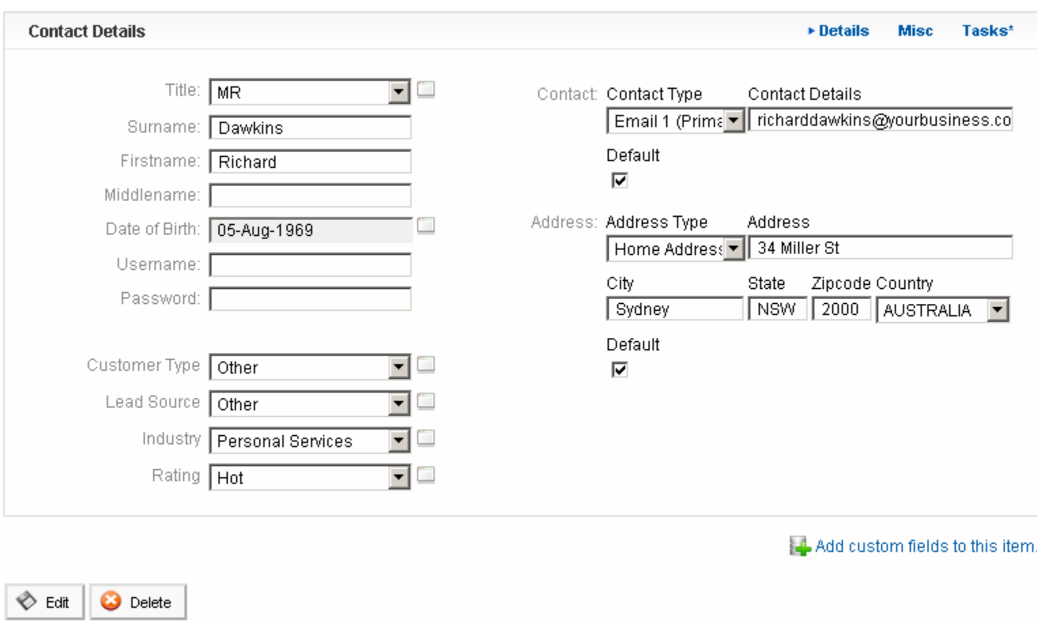
Editing a Contact's Details

You can edit a contact's details by clicking onto **Work with customer details** link in the Action Box. Click on the **Edit** button. Now all the fields become editable and you can alter the fields.



Deleting a Contact

You can delete a contact if you desire, although you should be aware that **deleted contacts cannot be retrieved**. To delete a contact, click **Delete**



8.3. Cases and Case Management

What is a Case

A **Case** is a record of a customer's interaction with your business. A Case can be created manually or automatically. Cases would be created manually by the sales or customer service representative, when the customer calls on the phone or contacts your business directly in person, via the phone or via email.

Cases are created automatically when a web form is submitted on your web site. The **custom fields on that web form are also captured in the resulting Case Record**. Most cases in the system will be created via web form submissions.

It's important that a case is created each time a customer interacts with your business. This enables you to keep a history of all interactions with the customer and refer to them at anytime in the future.

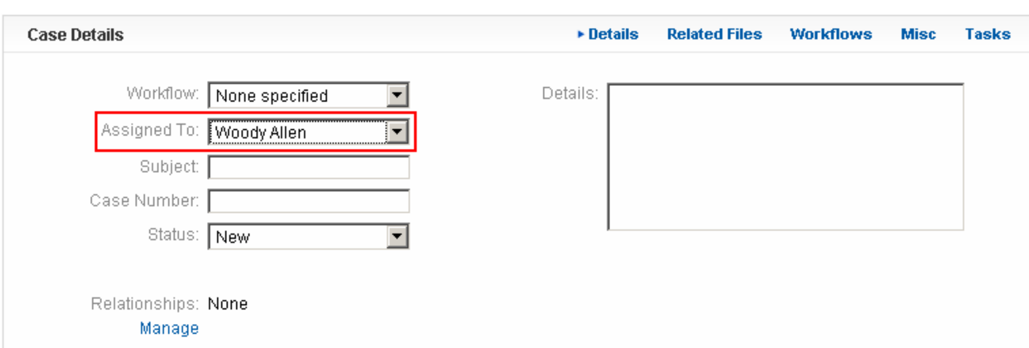
Subject	Status	Name	City	Country	CreateDate	Assigned To	View
Support Form/q	New	Support			10-Aug-2007 10:27 AM		View
Contact Us Form	New	Support			10-Aug-2007 10:28 AM		View

Creating a Case Manually

To add a case manually click on **Customer Cases** link in the Relates box of the customer record. Click **Create a New Case**. You can enter the **subject** of the case and create **notes and tasks** as necessary. You can choose a **workflow** for your case. Once you have saved your case you can initiate the workflow and notify the relevant people who are responsible for completing the relevant tasks associated with the case.

Case Ownership

Case ownership is decided by who created the case. If the case was created via a web form, anyone can take ownership of the case by selecting a user from the **Assigned To** drop down. The case will get assigned to this person. This is primarily for reporting purposes.



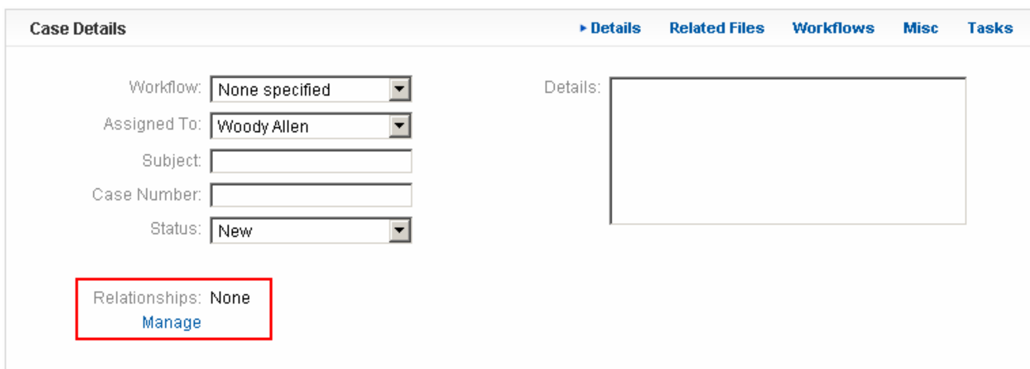
Case Relationships

Case relationships are a way of creating links between a single case to more than one customer. This is useful if a case relates to multiple customers, for example, if you are a builder, then the building of a house may relate to:

- The customer who owns the house
- Suppliers who are involved in the construction

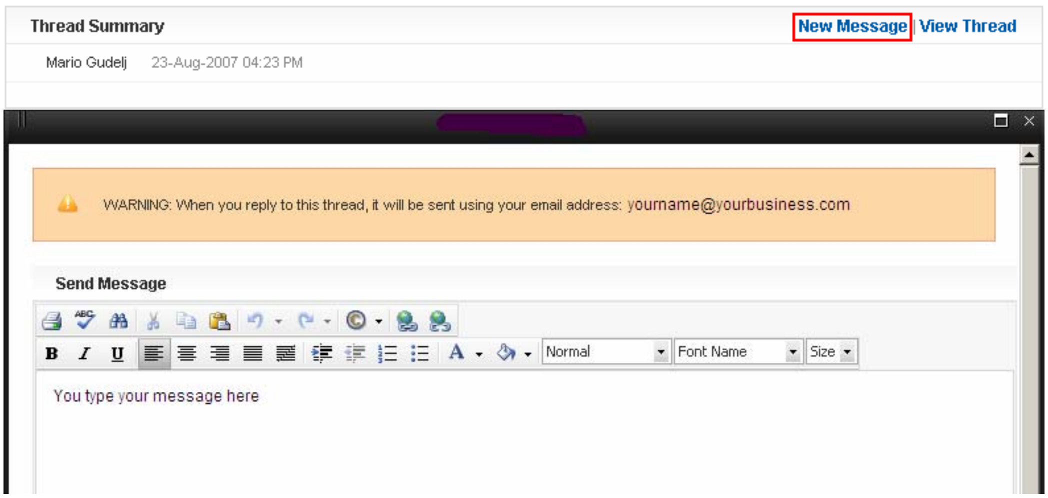
By relating the case to the suppliers as well, you can then create secure zones on your website to allow your suppliers **and** your customer to login and view their cases, their status and any other related information.

For more details on this, see the section on publishing cases.



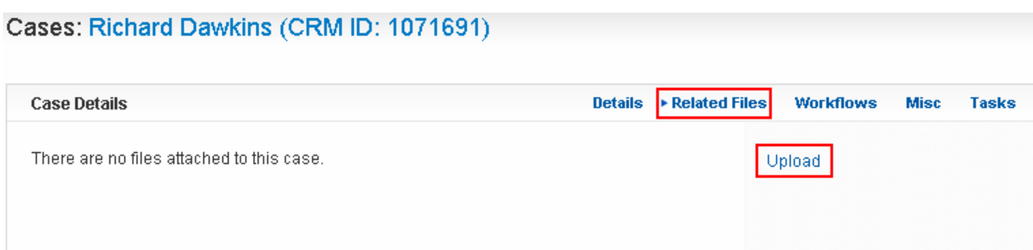
Case Threads

Threads allow you to create a running conversation between you and the customer via email related to the current case. Click on **Threads** to bring up the online editor that allows you to write an email to send to the customer directly from the web-based Administration interface. When you are finished, click **Send Message** to email the customer. Your email will be saved against the case for future reference.



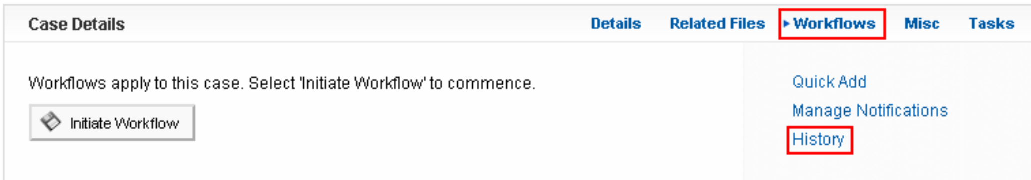
Case Files

You can upload and attach one or more files to your cases. These are files related to the current case and serve as a reference. If a web form consists of the file upload field, then any files upload will be automatically attached to the case. If you are publishing cases in secure zones, you can also publish case files and allow customers to easily download them. This is discussed in further detail in a later topic.



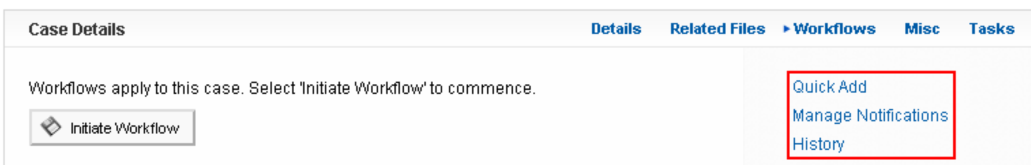
Case Workflows

Under Case Workflows you can view the workflows that apply to this case. By clicking on **History** you can view the history of the different workflow steps that have been completed. You can run the same or different workflows for a case. However no two workflows can run at the same time.



3rd Party Notifications

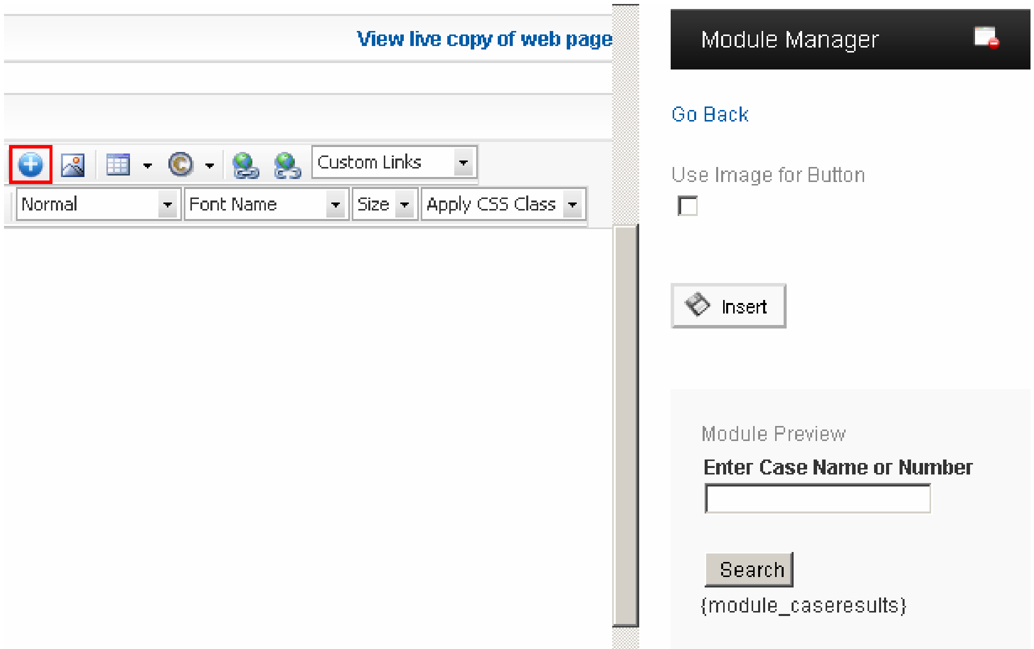
Quick Add allows you to quickly add this customer to a workflow process that supports 3rd party notifications. **Manage Notifications** allows you to add other customers to this case's 3rd party customer notifications. Please refer to previous section to learn more about 3rd party notifications. In essence 3rd Party Notification can keep your customers in the loop as a workflow process progresses internally within your organization. For example if you are processing a loan application for a customer, you may want to keep the customer in the loop as the loan application progresses internally towards approval.



Publishing Case History for Customers on Your Website

There are many situations where you might want to allow your customers to view their cases online. For example a finance company may want to show customers the progress of their application. You can do this in a few easy steps.

1. Set up a **Secure Zone** for your customers.
2. Create a new **web page** and add it to the secure zone.
3. For that web page, click on the **Editor** tab and open up the **Module Manager**.
4. Under **Secure Zones**, you will see the case related modules such as
   a. **Case Search**, to search for cases by their name or ID number
   b. **Customer Case History**, to display all of the cases for that customer, or all of the cases related to a particular workflow (such as a loan request workflow for the finance company).

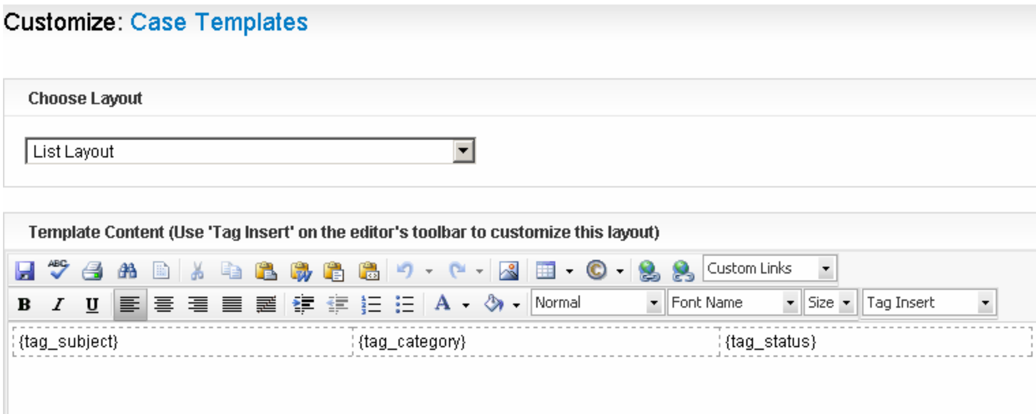


NOTE:

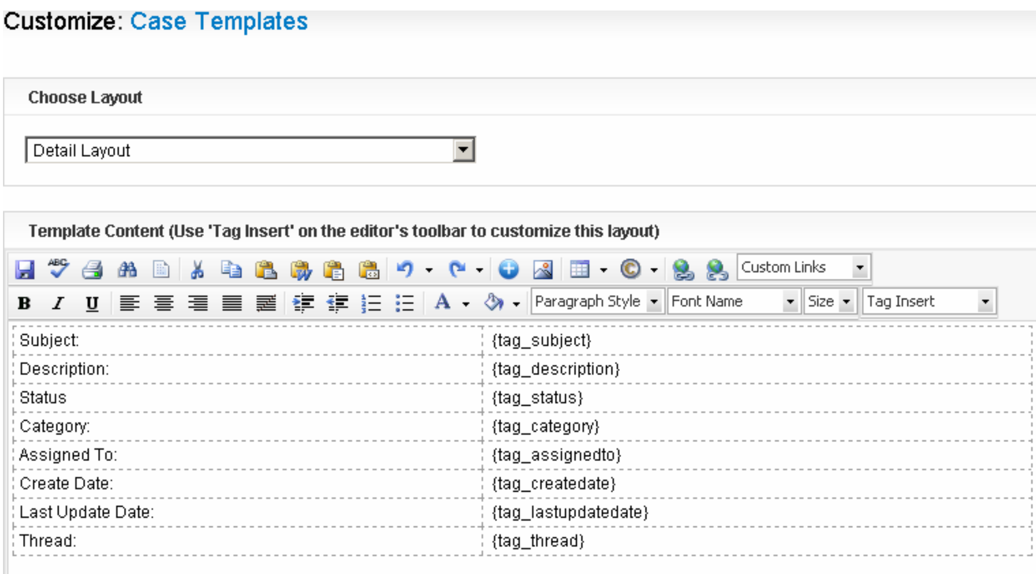
- Your Online Business also provides a web services framework to allow the addition and updating of cases.
- To enhance customer experience you may place the Case Search module in a secure zone to allow customers to search through their cases and retrieve them quickly.
- When publishing cases in secure zones, customers will see their cases and any other case that have been directly linked to them using the Cases Relationships option. Refer to the Case Relationships topic to learn more.

Customizing the Case History Layout

As with everything in the system, how the case list and history is laid out is entirely up to you. You can completely customize this in **Admin -> More Customization Options.** Click on **Customer Cases Templates**. You can modify the **List** template, and add and remove the tags you want to display (refer to Customizing Your Online Business).



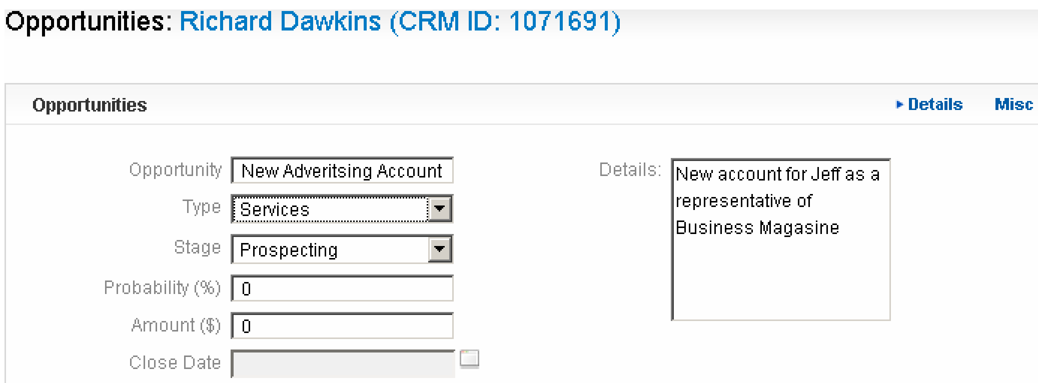
You can also modify the **Details** template, adding and removing the tags you desire, and rearranging the HTML to suit your desired look and feel. You can publish the case details, conversation threads, case files (with the ability to download) and any custom fields that may be attached.



8.4. *Opportunity Management*

Opportunities are used to track the potential value of a pending or hoped for sale to the customer. You would use Opportunities to assist in tracking and reporting on your sales pipeline. When you pitch to a customer you should create a new opportunity for that customer. You should then manage the opportunity as it progresses through the various stages of sale. Using Opportunities in conjunction with the Forecasting features built into the system you can ensure a holistic view of your company's sales performance.

Go to **Customer -> Customer sales Opportunities**. Create a new opportunity by clicking on the **Customer sales Opportunities** link. Enter the opportunity's name under **Opportunity**, and specify its **Type**, **Stage** and **Description**.



Enter the probability of closing the deal, as well as the value of this opportunity. When the deal is either won or lost, you would update the **close date**. Click **Save & Finish** to finish.

8.5. *Forecasting*

Forecasting works hand-in-hand with opportunities. Imagine this scenario. You have two sales staff each with a $5,000 monthly sales target. Ensure you enter the **Sales Quota** for each sales user (Admin -> Manage Users -> Sales Quota).

As you enter sales opportunities into the system and enter the Stage that the Opportunity is in and the Probability of the Close, you can use Forecasting to track your company's sales performance.

For example:

	Forecast Amount	**Best Case**	**Closed Amount**
Month 1	$10, 000	$8,000	$3,000
Month 2	$10, 000	$5,000	$1,000
Month 3	$10, 000	$3,000	$0

The **Forecast Amount** is the sum of the sales quota you have set for each user in the system for any given month. **Best Case** is the Probability of any Opportunity that is not yet closed or lost multiplied by the amount of the Opportunity. And Closed Amount is any Opportunity that has been successfully closed.

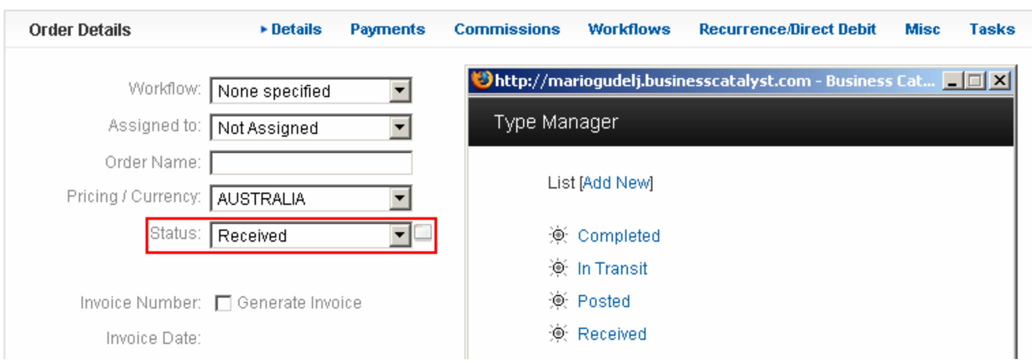
8.6. *Order Management*

Orders are records of product or services that have been ordered by the customer. **Quotes** are a particular type of **order** in the system that do not have a price listed against them. Orders are usually created via a customer proceeding to checkout on your online shop. However, you can also manually create an order.

Creating an Order

To create an Order, go to the **Customer Orders** tab under the customer record. Click **Create a new Order**.
Most fields are self explanatory and you need to fill them out accordingly. Some that require special mention include:

- **Pricing and Currency.** If you have set up pricing and tax codes for different countries, this drop down allows you to choose which country's pricing to choose from
- **Status.** This allows you to set the status of the order. You can add your own status by clicking on the small box next to the status dropdown.



- **Generate Invoice.** When creating an order manually, an invoice is **not** automatically generated. When you have added the products and are happy with the order you can click to generate the invoice.

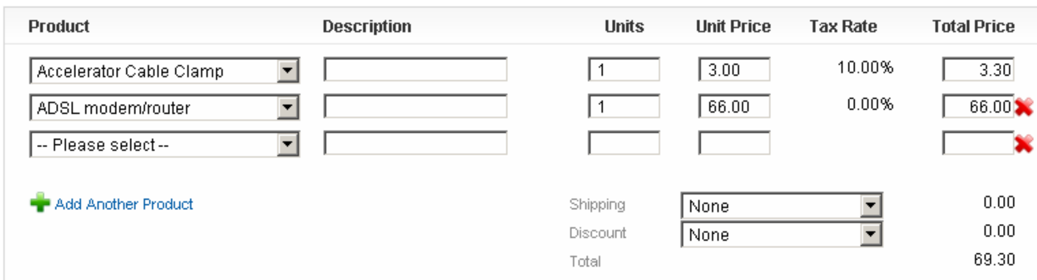
Once you have entered the order's details, click **Save.** See the next section for adding products to an order.

Adding and Editing Products in an Order

Go to the customer's record, and click on Orders, then click on the order you'd like to add products to. Under the **Product** section you'll see the list of existing products. Select products from the dropdown menu by selecting a product name.To add more products click on the **Add Another Product** link.

You can easily edit each product as you add it to the order. Enter a short description if desired, modify the number of units for that product, and confirm or edit the price per unit. Tax Rate is automatically retrieved based on the **Pricing & Currency** country you chose earlier.

Click **Save** when complete.



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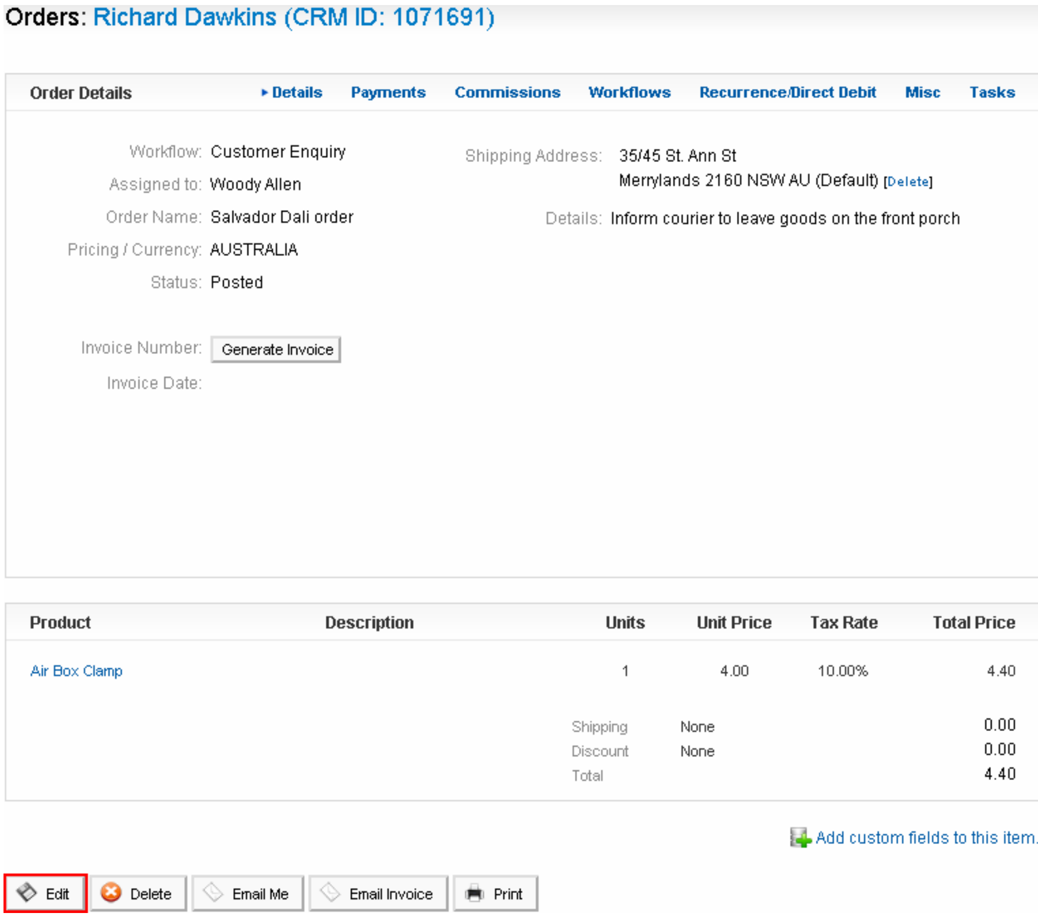
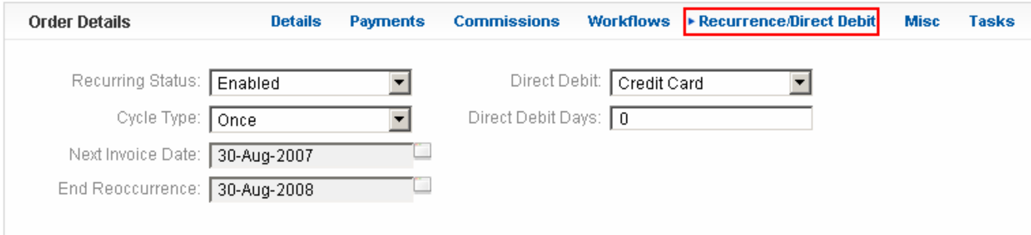
Editing an Order

You can edit an order at any stage by clicking the Edit button. All the fields will then become editable



Reoccurring Orders

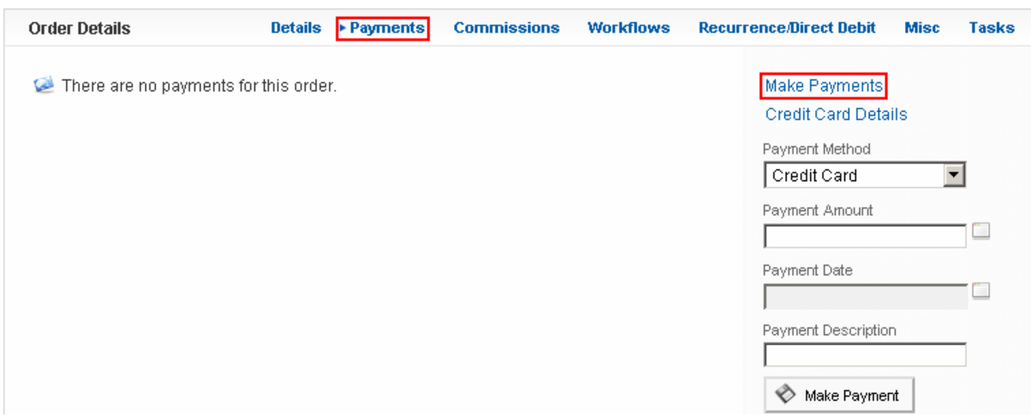
You may want some orders to have a reoccurring invoice, if you are a selling a subscription for example. This is easy to do! When editing an order click **Reoccurrence/Direct Debit.** Set the **Recurring Status** to enabled, then choose the cycle type for the period of time to elapse before each reoccurrence (daily, weekly, monthly etc). Finally choose the **Next Invoice Date**, after which the reoccurrence cycle will begin, and choose a date for the reoccurrence to end.



<u>Making Payments on Orders</u>

You can make payments on orders if you desire. This simply marks the order as paid or partially paid by the amount you enter – even if you choose **credit card** it will not contact your payment gateway to make a payment. That means if you make payments this way you should already have actually received the payment.

Select **Payments -> Make Payment** and then choose your **Payment Method**, the **Payment Amount** (if it is the full amount, click the small box next to **Payment amount** to copy the full amount in), the **Payment Date** and the **Payment Description** (i.e. "half payment", "deposit" etc). Click the Make Payment button to complete.



<u>Order Workflows</u>

Order workflows are like case workflows. You can designate a particular workflow to fire when orders are created by going to **Admin -> Manage Workflows**. Select the workflow you wish to use and check the **Orders** checkbox. When a workflow is linked to orders all your online orders will trigger that workflow, and the workflow history will be recorded under the **Order Workflows** heading.

<u>Automated Orders</u>

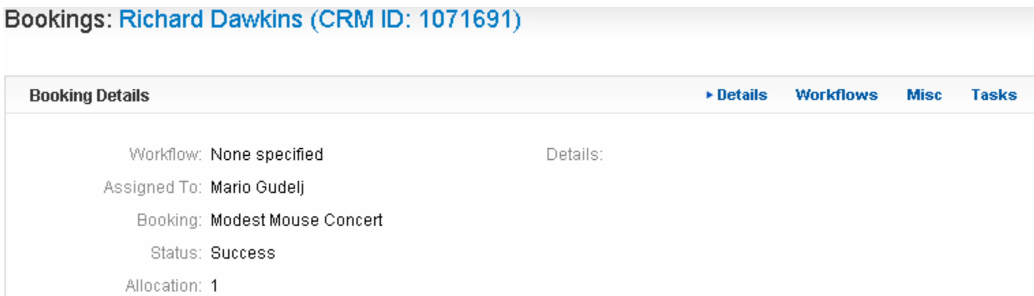
When an order is created via your online shop, several things are automated.

- An order will be created.
- The order's details and products will be filled in as per the customers order.
- When using a payment gateway is set up,
    - If **payment succeeds**, an invoice will be generated and emailed to the customer.
    - If **payment fails** then **no invoice** is generated, but an order is still created.

Naturally for automated orders you can still **edit** the order if required.

8.7. Bookings

Customer Bookings link shows a history of all the bookings a customer has made to your current or past events. All booking attempts including those that have failed are logged here. This is displayed using the **Status** dropdown option. After a customer has attended your event you should update the booking status from **Success to Success and Attended**. By doing this you can report on past bookings in the future and retrieve accurate statistics about popularity of events and their attendance.



Booking Workflows

Under Booking Workflows you can view the workflows that apply to this booking. By clicking on **History** you can view the history of the different workflow steps that have been completed. You can run the same or different workflows for a booking. However no two workflows can run at the same time.

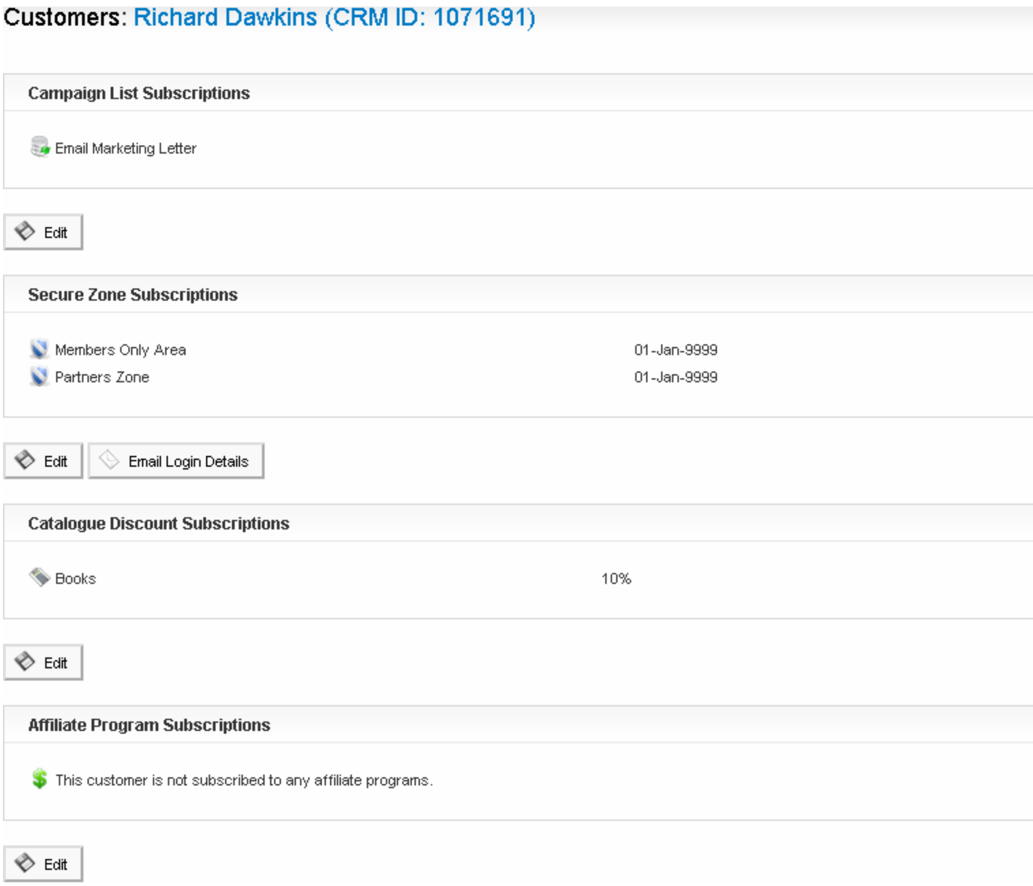
8.8. *Subscriptions*

The **Manage Customer Subscriptions** link allows you to centrally manage your customers' subscriptions to:

- Secure Zones
- Campaign Lists
- Catalogue discounts
- Affiliate Programs

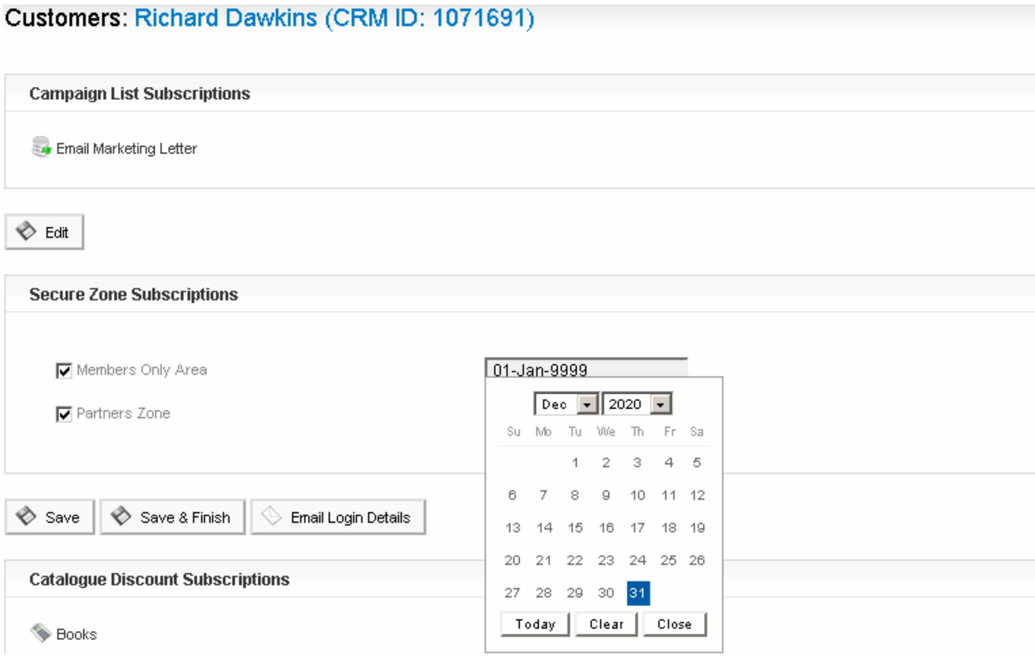
All subscriptions can be edited by clicking on the **Edit** button.

Editing Email Campaign List Subscriptions
Simply check the boxes for the lists you want to subscribe the customer to, and click **Save**.



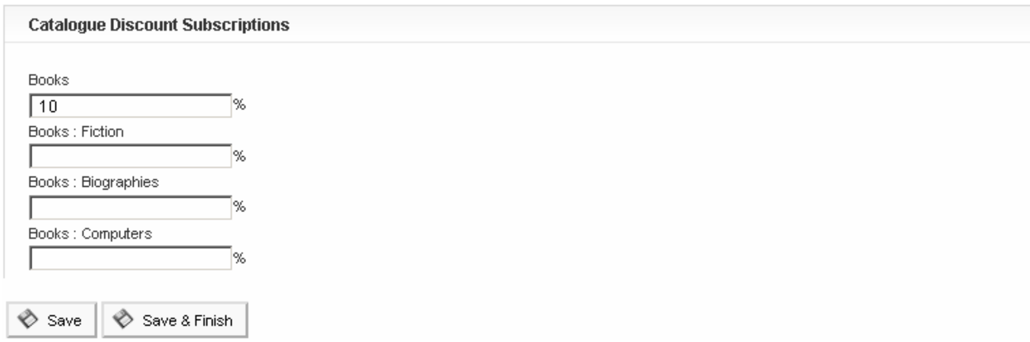
Editing Secure Zone Subscriptions

Simply check the boxes for the secure zones you want to subscribe the customer to. For each secure zone you can select an **access expiry date** if you require. Click **Save**.



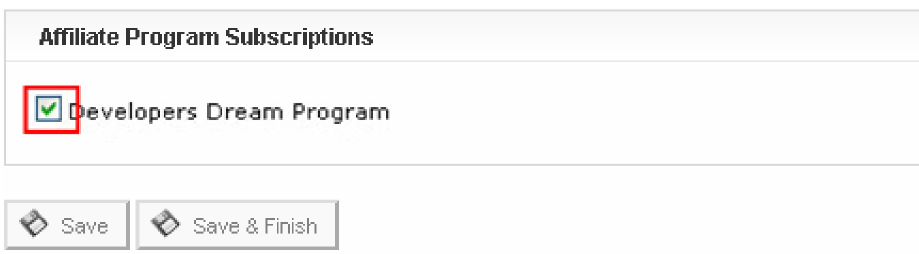
Editing Catalogue Discount Subscriptions

For each catalogue you can give **this** customer a particular discount. Simply enter the percentage to discount for the desired catalogues and click **Save**.



Editing Affiliate Program Subscriptions

Simply check the boxes for the affiliate programs you want to subscribe the customer to, and click **Save**. You then need to go to **eCommerce -> Affiliate Programs** to generate the affiliate link and send them to you.



8.9. Using Customer Report generator

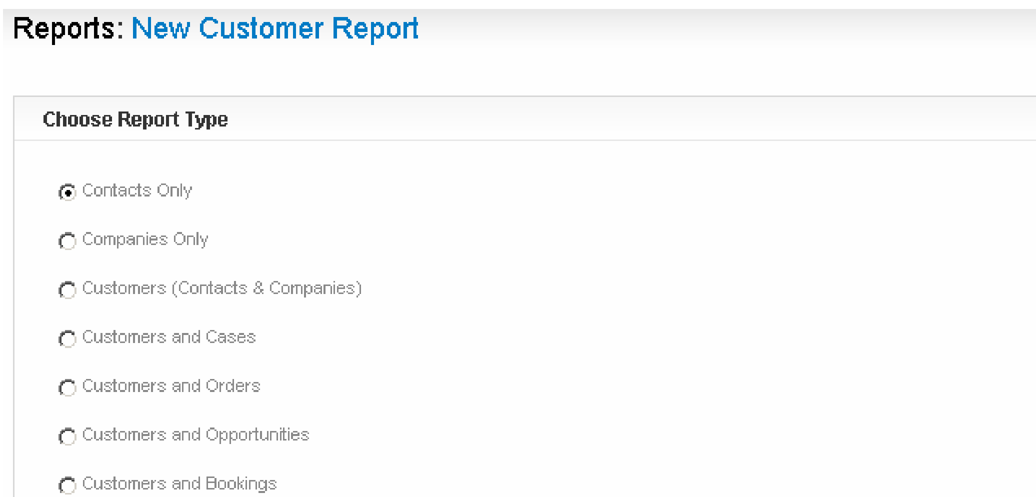
The Customer Report generator is a powerful tool to generate customer reports. You can easily generate reports on:

- Customers
- Cases
- Orders
- Opportunities
- Bookings

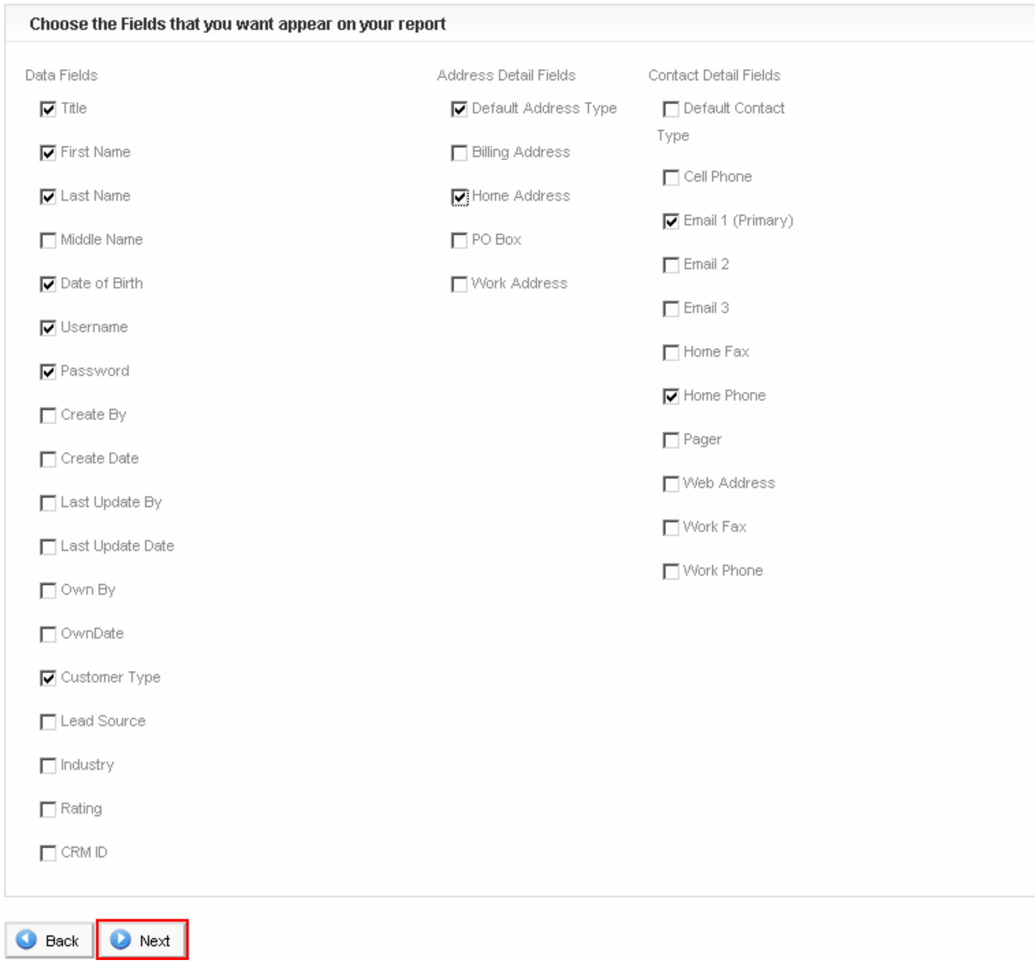
This is a simple three step process done via a wizard style interface. You can create a report, view the results and save the report for later use.

Creating a Report

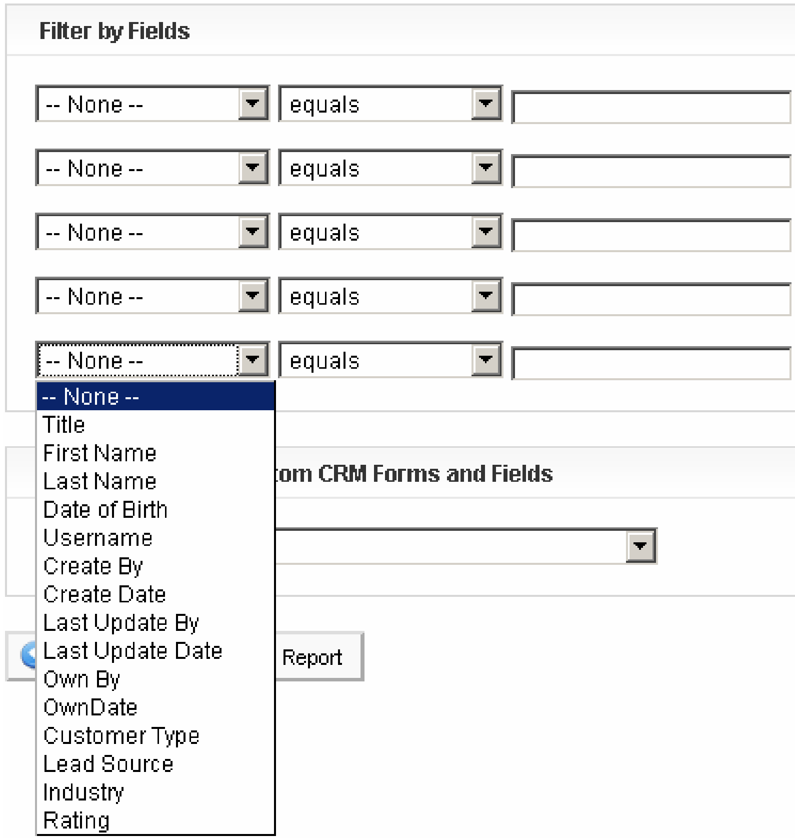
Firstly, go to **Reports -> Create a Customer Report.** Click **Create a new Customer Report** to create a new report. Now select the data you want to report on, and click **Next**.



The **Fields** tab then allows you to select the fields you want to display and filter on in your report. Click **Next**.



Now you can choose the fields you want to **Filter** by. You can create up to five filters. For each filter, start by selecting **field** to filter on at the far left. Then from the center dropdown select the **condition** to filter on. Finally on the right enter in the data to filter against.



You can also filter by information found in CRM Forms and Web Forms. Under **Filter by your own custom CRM Forms and Fields** select the CRM form or web form that you want to filter by.

You can then choose to display **all custom fields in report**. This will then include all fields of that form in the report.

You can also filter on custom fields by **selecting options for the fields** you want to filter on. The results will then display **only** those records that made the **same selections that you did**.

When you are happy with your filter options, click **Generate Report**.

Title	Firstname	Lastname	Email 1 (Primary)	Home Phone	View
MR		Support			View
		sdadsd.lg	sda@c'		View
MR	TDW	ELLISCOLE	tim.elliscole@za		View
MR	BEN	TILEY	tiley@oze		View
MISS	T	MANOLAS	tiffany.manolas@e		View
MS	TIFFANY	DAWSON	tiffany.dawson@p.		View
MR	STEVEN	BROWN	tibi23@tpg		View
	TRISH	THOMAS	thomaspd@netsp		View
	A / T	JOHN	thomas.john@		View
MR	THOMAS	FICHTENMAIER	thomas.fic' tenm.		View
MR	TERENCE	HAYDEN	thhayden@b		View
	REBECCA	WASHER	thewashers@pa		View
MR	TONY	SIMSON	thesimsons@optu		View
MR	MARK	FAHD	theresafahd@op		View
MS	KAREN	GALLOWAY	theredshoes.@ho		View
MS	S.P.	PETHER	thepethers@ozr		View
MS	THEONIE	PAPADOPOULOS	theoniep@bigp		View
	THEO	LE	theo@aist		View
MR	THEO	JOHNGELING	theo@accou		View
MRS	JODIE	MONK	themadmonk@exe		View

Change page: < 1 2 3 4 5 6 7 8 9 10 ... > | Displaying page 1 of 208, items 1 to 20 of 4159.

After you review the results you can click **next** to then give the report a name and save it.

Adding Customers in Bulk to Campaign Lists and Secure Zones

You can add the customers that your report returns to a list or subscribe them to a secure zone. On the same screen when once the report is generated click the **Add Customers To** button. You can then select to add customers to a campaign list or secure zone, as depicted.

Click **Submit** when you are ready to add the group to the list or secure zone.

8.10. Reporting

The system is constantly collecting vast amounts of data on your customers' activities. While you can create custom tabular reports using the report generator, you can also view the system's reports on your customer activities and graphs on your content's performance.

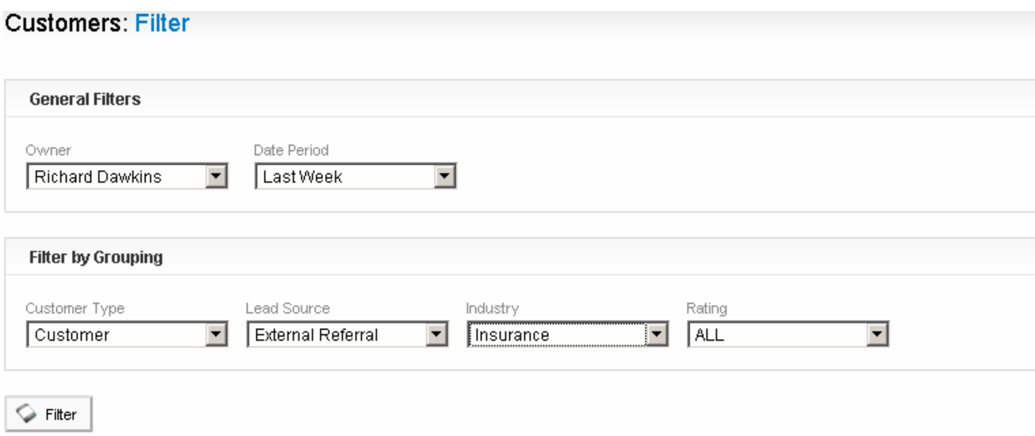
Reports can be found under the **Reports** menu option.

Customer Reports

Under the **Customer** sub-menu item you can see reports that you can filter by fixed time period or by classification/owner and several other options. Reports are available on:

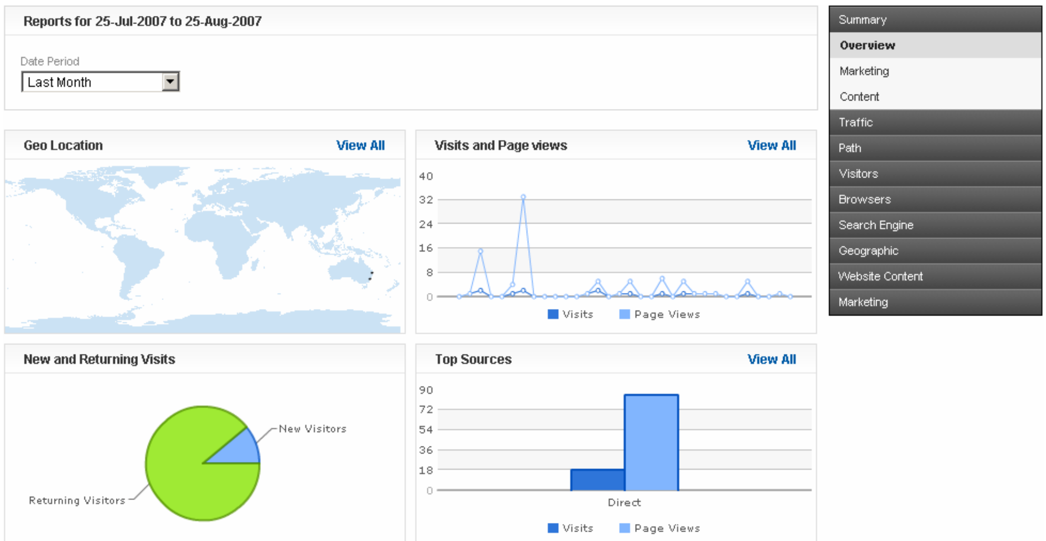
- Contacts and Companies
- Cases
- Opportunities
- Orders

For each report, you can export the results or refine your date period that things are filtered on.



Website Reports

Webite reports help you gauge the effectiveness of your content. You can view all of these reports under **Reports -> Summary**.



8.11. Using SiteWalk to Manage Content

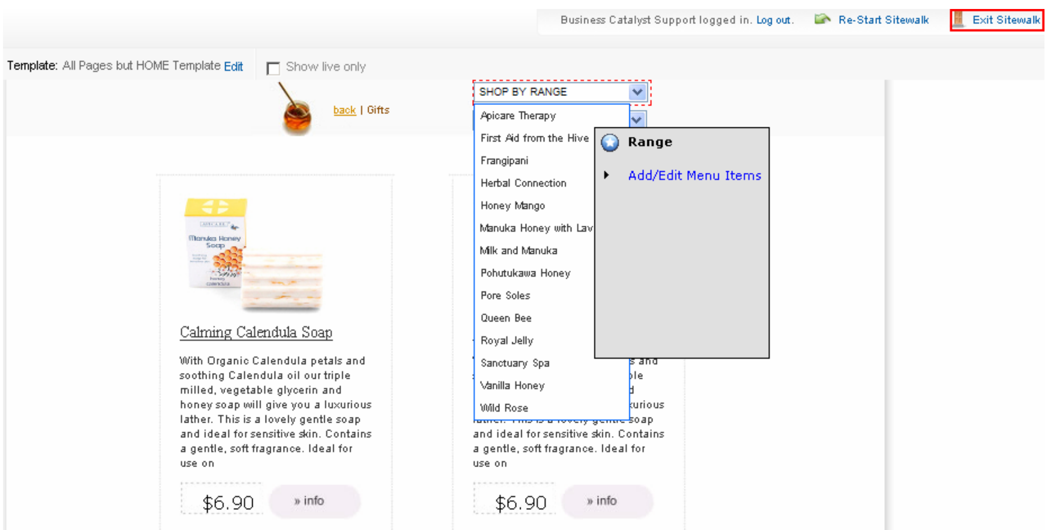
Keeping your content fresh and up to date is an important part of managing your online business. SiteWalk is an intuitive and easy way to just that.

The SiteWalk Panel

On the left of the screen you see the SiteWalk panel. The SiteWalk panel shows you the name of the page you are viewing, and gives you options to edit the web page with **Edit Web Page**, or jump straight to the web page editor with **Use Editor**. **Manage Security** allows you to add the page you are currently viewing to a secure zone.

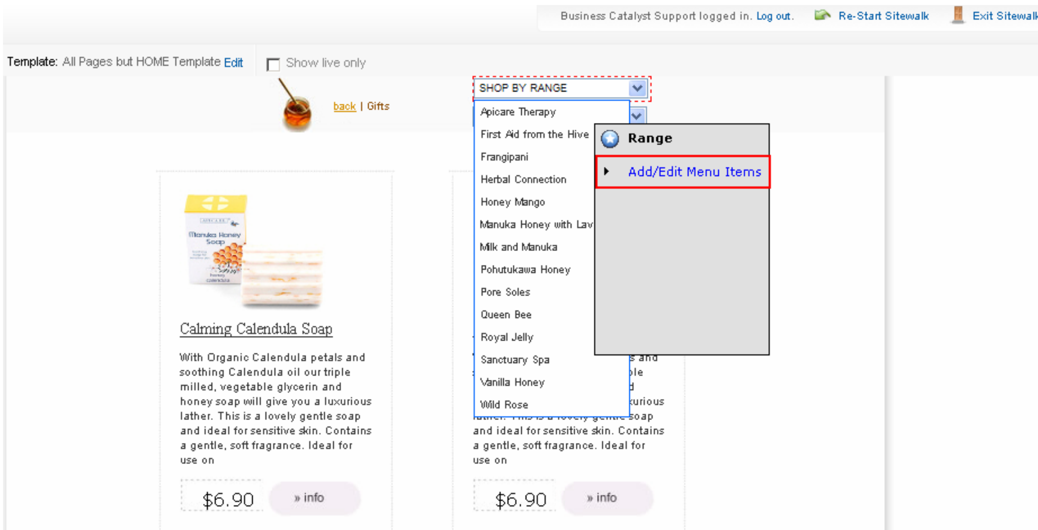
You can **Edit Template** of the page you are currently viewing, and by checking the **Show live only** option, you will only see live pages (not your drafts)

Click on **Exit Sitewalk** to leave SiteWalk and go back to the administration interface.



Using SiteWalk

The premise behind SiteWalk is that you should be able to navigate your site and make changes as you browse. As you move your mouse pointer over different elements on the page you will be given options to edit that content somehow. This enables you to update and make changes to various aspects of the system only by knowing where your customer finds them, rather than the item's name or how it was created!



9. Email Marketing

9.1. Introduction

Lists and Campaigns go hand-in-hand together. Having a list is a pre-requisite to sending your campaigns. A list is any set of your customers which have been grouped together by you for the purposes of receiving an email newsletter.
When you create a list you are effectively putting a label on a group of customers to whom you wish to send one or more email newsletter campaigns to. For instance you may want to create a list and have your customers' subscribe to it by placing a subscription form on your website. You will use this list to send your Monthly Newsletter to.

9.2. Working with Lists

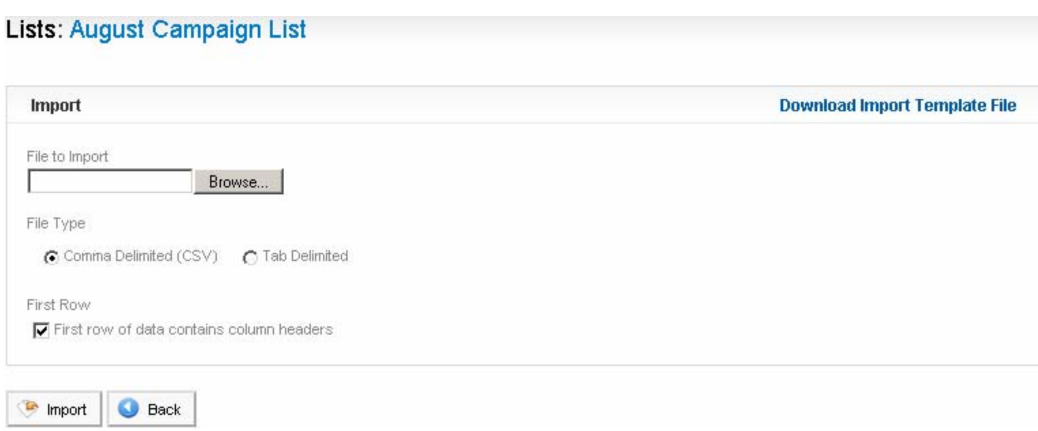
Growing your list

There are 3 ways you can grow your list.

1. Add a subscription form to your website so customers subscribe themselves to it. When a new customer subscribes to a list via your website they will be asked to verify their subscription by receiving an auto-responder email which contains a verification link.

2. You can easily import an existing customer file. Your file can either be in CSV (comma delimited) or TAB delimited format. A list of fields that can be imported are included in the Import tab.

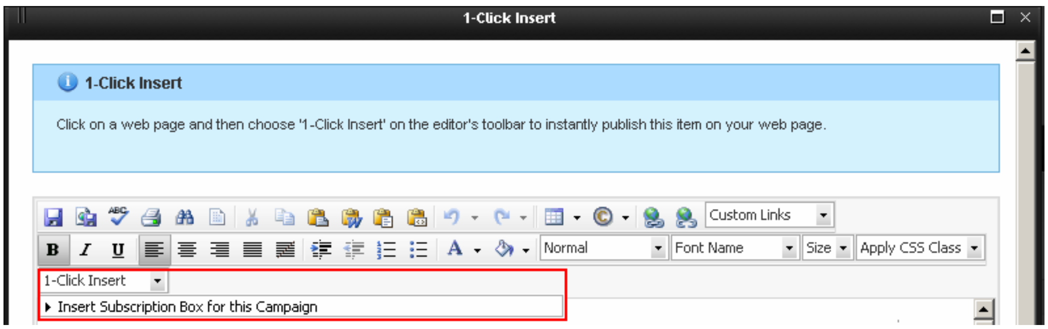
3. You can manually add customers to any list either by using the Quick Subscribe option in Lists or when you view a customer's record by clicking on the Subscriptions tab.



Adding a list subscription form to your website

The system automates the creation of a subscription form that you can use to capture subscribers on your website. You don't need any technical knowledge for this process. If you are using the entire solution then clicking onto **Add subscribe box to a web page** is the fastest way to do this.

Select your List and then click on the Add subscribe box to a web page. Select the web page you want to add your subscription form. Once the online WYSIWYG editor has loaded, choose the **insert** option in the 1-Click Insert feature on the editor's toolbar. By selecting this, a subscription form for this list is instantly added to the web page.



Make sure you click the **Save and Publish** button to finalize. If however your website is hosted at a 3rd party then select the HTML Code option where you can copy and paste the HTML code generated into any of your web pages.

The subscription form when not customized will contain two fields that will capture subscribing customer's name and email address. You do have the ability to **create a customized subscription form to collect any other information that is relevant to your business**. For instance as a sports retailer you may also want to ask a question such as "What is your favorite sport?" with the following answers "Golf, Football, Swimming". By capturing this extra information when your customer's subscribe to your lists you can further target your email newsletters. To do this, you use a **web form** instead, and customize it to suit your needs. See the chapter on Web forms for more information.

Unsubscribing from lists

Customers do not unsubscribe from lists but your campaigns. Your list is simply a set of your customers that you use to send an email newsletter to. However if a customer does not like your email newsletter and opts to unsubscribe then the system will record that they unsubscribed from a specific campaign and **will mark them disabled from all future campaigns**. The customer will remain in this list as the list is nothing more than a set of your customers that you have grouped together. For this customer to receive future emails newsletters from you, you will need to request permission from them to do so.

9.3. Email Campaigns

Introduction

Email marketing is one of the most **cost-effective** and **powerful** marketing tools available today, and one that your company can use to build stronger relationships with your customers. Email marketing allows you to cultivate loyalty in a customer base, providing them with a great value proposition for your products and services - increasing traffic to your website and strengthening sales potential.

Unlike most email marketing solutions that enable you to send one-off email newsletters to your customer base, this solution allows you to do much more simply because of the overall product offering. The possibilities are greater and can have a significant impact on your bottom-line. Right now one-off email newsletters campaigns would make up the bulk of your email marketing activities. Ongoing loyalty-based campaigns are another form of email marketing ignored by most players. These types of campaigns will not only compliment one-off email broadcasts but put a very different slant on how you can use email marketing to build relationships that translate into dollars for your business.

Here are some of the key features that will help you outperform your competitors:

- An easy-to-use wizard for creating email marketing campaigns
- 100's of templates to use for creating stunning email newsletters
- Extensive reporting to measure effectiveness, including open rate, links clicked and bounced emails
- Ability to customize your newsletter subscription forms
- Better spam prevention and control
- Choice of both one-off campaigns and ongoing loyalty-based campaigns
- Ability to include and subscribe customers to affiliate programs within campaigns
- Double opt-in mechanism for customer subscriptions

Campaigns vs. Lists

Before you embark upon email marketing it's important to understand some of the terminology used in this area. A **List** is simply any group of your customers that you want to send an email newsletter to. A **Campaign** on the other hand is an email newsletter which has been scheduled or has already been sent to this **List** of recipients. Every time you undertake a campaign you can use any list which signifies the recipients who will receive your email newsletter campaign.

Getting Started

Before you create an email marketing campaign you have to **choose the type of campaign you want** to send. If you are new to email marketing then more than likely you will want to send an email to a number of your customers and measure its effectiveness. When we talk about "measuring effectiveness" we are referring to how successful your newsletter was as far as how many recipients received and read it. Every time you send out an email newsletter, the **system will automatically measure who opened your email**, which links within the email they selected and how many recipients unsubscribed from your newsletter. There are also many other useful reports that will help you measure the success of your campaigns.

There are 3 main parts to every email newsletter campaign:

- Choosing the type of campaign
- Writing the content of your newsletter
- Choosing the recipients of your newsletter

One-off vs. loyalty-based campaigns

One-off campaigns are the most popular forms of email marketing. A **one-off campaign** is an email newsletter that is sent to a group of your customers at some date in the future. For example you might write a newsletter called "April Newsletter" and send it to your customer database. This is a one-off newsletter. Of course you may continue on and send another newsletter in May called "May Newsletter" but again, this is a one-off newsletter.

If you are new to email marketing then you should start with a one-off campaign, then when you are ready you should also explore loyalty-based campaigns.

Understanding Loyalty-based campaigns

Loyalty-based campaigns automate communication to a group of your customers on a one-by-one basis. There are many types of loyalty-based campaigns.

To give you a better understanding here is an example of a birthday loyalty campaign. Imagine you are a restaurant, a hairdresser, a massage parlor or any other type of business which regularly deals with customers.

If you are in a position to collect your customer's date of birth or even just their **day and month of birth**, then you can setup **birthday loyalty-based campaigns** that automate communication to your customers on a one-by-one basis.

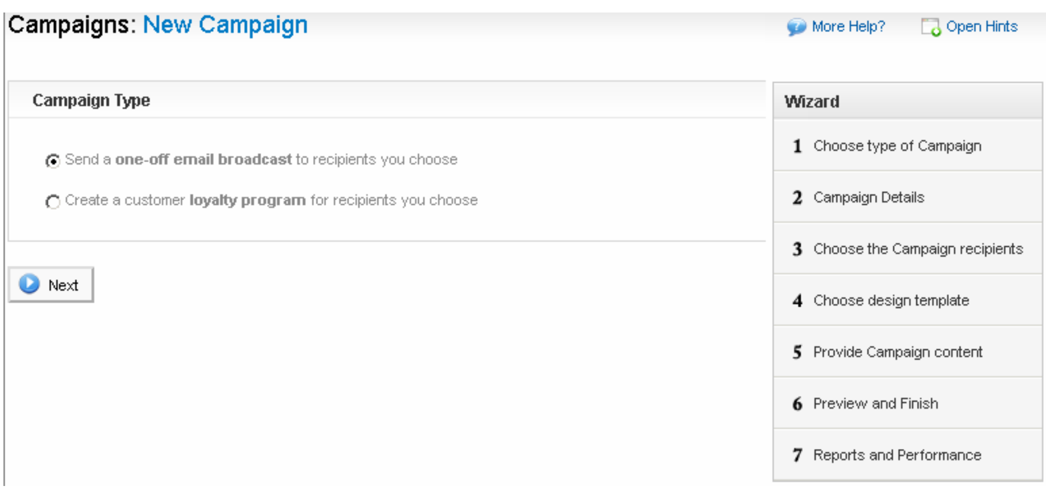
Once you create one of these campaigns and choose the list of recipients, **as each customer's birthday month is reached a customized email is sent to that recipient alone**. For example you can send an email wishing them happy birthday and include a sweetener such as a 20% discount or a 2-for-1 voucher if they purchased with you in the month of their birthday. This process continues around the clock and for every single customer in your recipients list. You needn't remember when customer birthdays are but you can rest assured that you are wishing them happy birthday and keeping them up to date with your latest products and offers.

Sending a one-off campaign

Creating a one-off campaign is a simple and quick process. You need to have covered off 3 essential items.

1. The **date** to send the campaign
2. The **content** of your campaign
3. The **recipients** of your campaign.

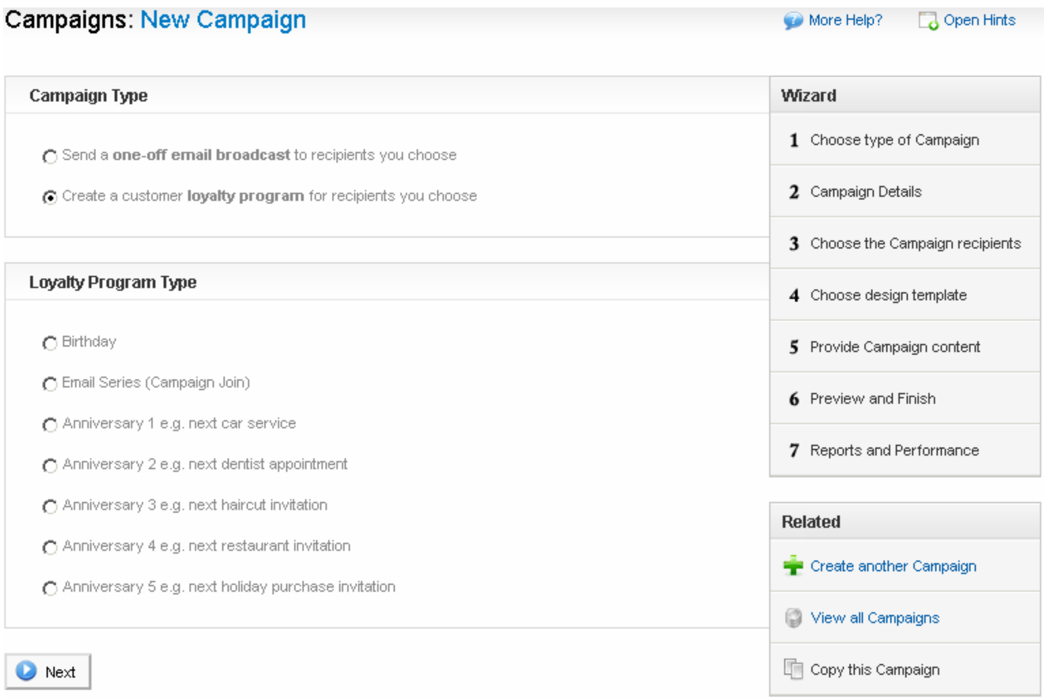
To get started use the wizard to go through the steps to create your one-off campaign. The wizard is intuitive and allows for the creation of stunning newsletters without any prior technical knowledge – just **follow the steps** from 1 to 7, and don't forget to **Save** at the end!



Sending a loyalty based campaign

Here's the complete range of loyalty-based campaigns that you can setup through this service.

- Birthday
- Campaign Join
- Anniversary 1 e.g. next car service
- Anniversary 2 e.g. next dentist appointment
- Anniversary 3 e.g. next haircut invitation
- Anniversary 4 e.g. next restaurant invitation
- Anniversary 5 e.g. next holiday purchase invitation



Birthday Campaigns

Are used as in the example earlier use them to get maximum value out a simple "happy birthday" message and drive them back to your business.

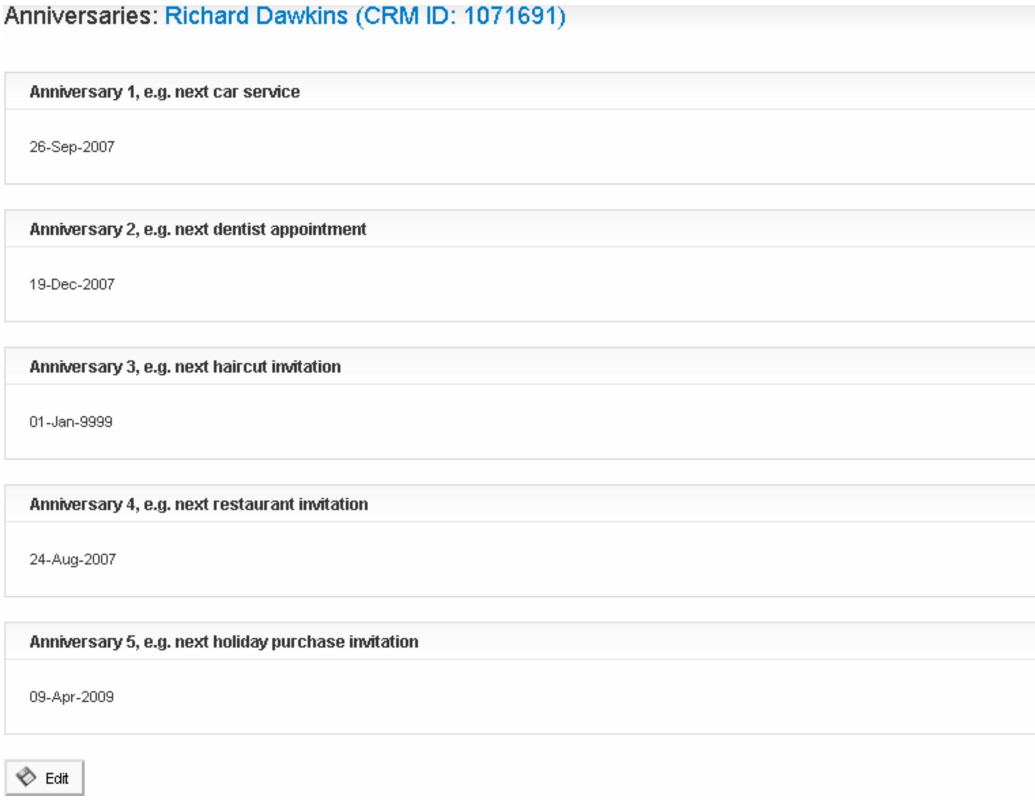
Campaign Join

Imagine if you write a newsletter which has 8-issues. In a **one-off campaign** you would have to **set the date** at which each issue is sent out to a list of recipients. One-off campaigns are great until you acquire a new customer that joins when you are **already up to issue 7** – that customer has **missed out** on issues 1-6!

Campaign Join campaigns allow you to **automate** the sending of newsletters to recipients **as and when they are subscribed to a list**.
For example if you setup a campaign of this type with 0 day, 7 day and 14 day delivery days then when person 1 joins, they will receive issue one straight away. Issue 2 will be sent 7 days after they subscribe and issue 3 will be sent 14 days after this person first subscribed. But when person 2 comes along a month later and subscribes to a list via your website they will receive the same issues at the same intervals relative to their subscription date. This process is repeated for every person that subscribes to the list attached to these campaigns.

Anniversary

The system allows for **5 anniversary based campaigns**. These are all of the same type but you can use each anniversary date for a different purpose. You can set up to 5 anniversary dates for each customer. To do so view a customer's record in "Customers" section and click on the "Anniversary" tab.



Here are some examples on how you can use anniversary based campaigns within your business.

- A travel agent could update the Anniversary 1 date with a date 12 months from the date of a customer's travel package purchase. Now you would setup a campaign of Anniversary 1 type which sends **a reminder to your customer that it's been 12-months since their last travels and that it's time for another holiday**!
- As a mechanic you could service a customer's car and then tell the customer **that their next service is due in 6-months**. You update the customer's record and enter a date 6-months from now for Anniversary 2. Your campaign will **automatically notify any customer when their next car service becomes due**.

Every business can and should take advantage of anniversary based campaigns. These types of campaigns can save you **a significant amount of time** whilst **delivering significant benefits** and driving **repeat business** for your business.

Setting up Loyalty-based campaigns

Loyalty-based campaigns are created just like one-off campaigns - with one major exception. When you create a one-off campaign you designate the date at which it's sent out to your recipients. With loyalty-based campaign you don't set a date for delivery **as each loyalty-based campaign is sent to customers based on some date relevant to that customer**.

You therefore **set Delivery Days**. For example **a Delivery Day of 0** for birthday campaigns means when a customer birthday is reached, on **the day of the birthday your campaign will be sent to them.**

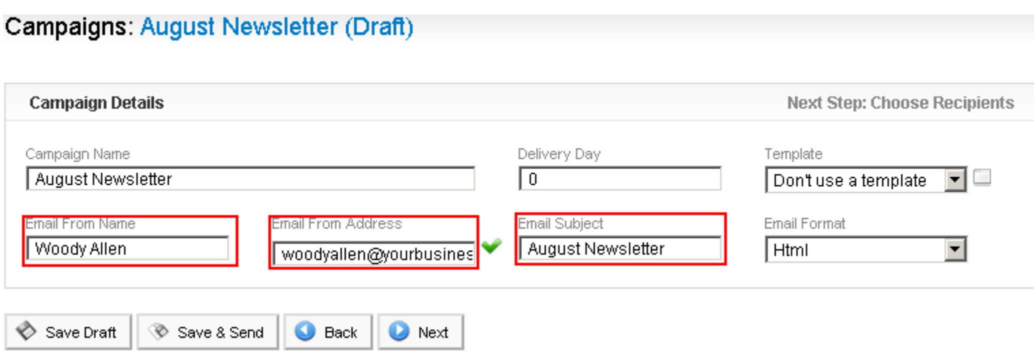
For a birthday campaign you may want to set a Delivery Day of -30 which means 30-days before a customer's birthday your communication is sent out. You may also want to have another campaign with a Delivery Day of 0 which wishes a customer happy birthday on the day of their birthday.

A positive Delivery Day such as 5 means your campaign is sent out 5 days after the relevant date.

Let’s examine how Delivery Days work with Anniversary-based campaigns. Imagine you update the Anniversary 1 date for a customer for 12-months from now. When you setup a campaign of this type with a Delivery Day of 0, when this future date for this customer is reached your campaign is sent to this customer. However if you had set the Delivery Day to 5, then the customer would have only received your campaign 5 days after this future date was reached.

For **Campaign Join** campaigns, you would create a series of newsletters by creating **follow ups** to the first email. This is done by **right-clicking** on the campaign you wish to copy, then changing the **Delivery Day** (and other details) accordingly. A typical campaign join series might go out at Delivery Days 0, 7, 14, 21, 28 and so on.

To complete the creation of your loyalty-based campaigns you need to finalize your content and choose the recipients.



Selecting your Recipients

You must choose the list of recipients for every campaign. These are the customers who will receive the email newsletter from you. When creating a campaign to send you have 3 options in regards to recipients.

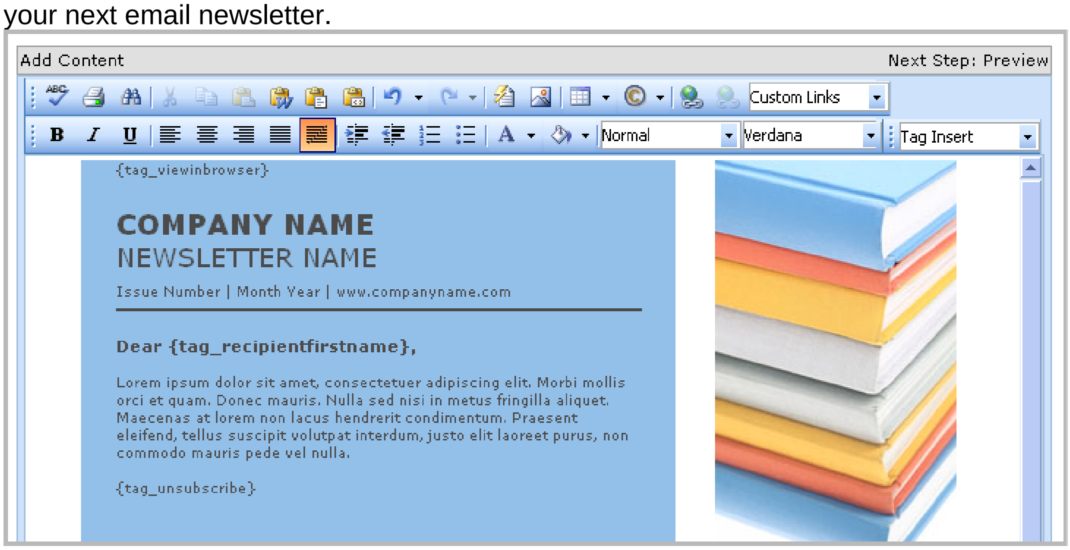
The most common option is to choose **one of your existing lists**.
Alternatively you can **create a new list on the fly** to import your customers into or add them manually one-by-one.

A third option is to send your email newsletter to **your entire database**. This option will email everyone in your database where they have **not previously unsubscribed** from a campaign and have not since re-granted permission to receive communication from you.

If for instance you choose your entire database and a customer does not have an email address then they will not be sent your email newsletter. If you choose a birthday type campaign and you have not specified date of birth for a given customer, again they are excluded from your broadcast. Please note that the system always uses the Primary Email address for a customer.

Personalizing Newsletters (Tag-Insert)

You can personalize every email newsletter. Personalizing email newsletters is an important part of effective email marketing. When you use the online WYSIWYG editor to create your email newsletter you will notice the **Tag-Insert list** on the editor's toolbar.
There are a number of items you can add to a newsletter to personalize it.
For instance **{tag_recipientfirstname}** will add your **customer's first name** to each newsletter. **{tag_unsubscribe}** will add the unsubscribe option to email newsletters and so forth. You can view the entire list of personalization tags when you create your next email newsletter.



HTML vs. Text Emails

When you create an email newsletter campaign you can choose to send it in either **HTML** or **Text format**. HTML emails are aesthetically much more pleasing. They are easier to read and can include images. They have a higher impact and can be much more effective in delivering your messages to your customers. **Only HTML emails can be reported on**. Statistics such as who opened your email and which links they clicked on only pertain to HTML newsletters. These statistics are not available if you send your email in Text format. Keep in mind unsubscribe and bounced reporting is available for both HTML and Text emails.

So why would you decide on Text formatted emails if HTML formatted emails are so much more powerful? Well there are a number of reasons why you would opt for a Text formatted email. Firstly not all your recipient's email clients support HTML emails. This is less of an issue nowadays but certain mobile email clients do not support HTML formatted emails. When you send HTML emails via this system we automatically include a Text version. This means if a recipient doesn't support HTML then they will automatically be shown the Text version.
The other reasons that you would opt to send Text formatted emails is spam.

HTML formatted emails are **often mistakenly considered to be spam**. It's not unusual for up to 20% of your recipient’s anti-spam software to consider your email newsletter to be spam and deliver it to the spam folder where the recipient is unlikely to ever see it. You can ask your recipients to add the email address you use for broadcasting to their white list (trusted list) but not all your recipients will do this nor know how to do this.

The dilemma between choosing a HTML or Text formatted email affects anyone familiar with email marketing. Experimenting and reviewing your bounced reports is an effective way to find out how many of your emails are getting through and how many are considered to be spam.

9.4. Spam Control and Issues

Spam is a major issue affecting everyone on the internet. We take strict preventative measures in this solution to ensure we curtail the explosion of spam. The following are some of the measures we take.

All campaigns require our approval

After you have created your campaign and it has been finalized it is sent to our team of qualified editors to determine whether its contents meet our requirements for broadcasting. Any email newsletter campaign sent through this system must adhere to our terms and conditions.

At a minimum any content sent must relate directly to your business. You must be a valid business and your business' existence must be easily verifiable, and you must undertake that your list of recipients have given you permission for you to be able to broadcast to them.

Once you have established yourself with us we will remove this requirement where your campaigns are sent out without any intervention from us. Please note that approval times can be up to 6 hours

Verify Your "From" Email Address

You must be the legal owner of the from email address that you use to send out your newsletters with. If your email address is not verified we will automatically send you a verification email when you create your next campaign. After you have clicked on the verification link that was emailed to you, you can finalize your campaign for broadcasting.

Unsubscribe option is enforced

You are able to completely customize your email campaigns. This means you can put the Unsubscribe link in any part of your email. Refer to our customization section to learn more. However if you decide not to include this link on an email newsletter then the **system will automatically append this to the bottom of your email**. If a customer unsubscribes from a campaign then they will not receive any future campaigns from you until they grant you permission again.

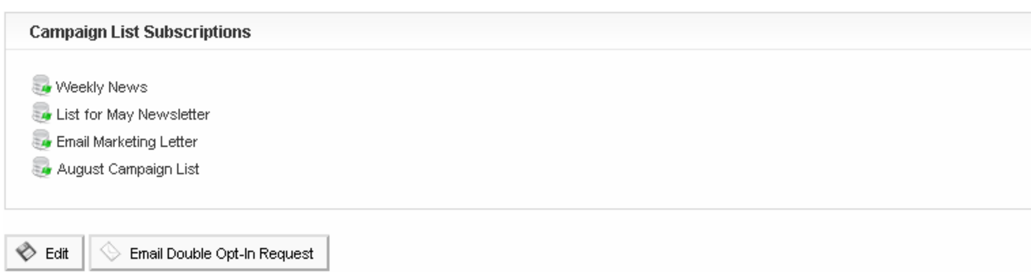
Double opt-in mechanism

Double opt-in is a process which **verifies a customer's subscription to your lists**. Generally customers will subscribe themselves to your lists by entering their details in your subscription form on your website. However it's important to verify that the person who subscribed did not enter somebody else's email address.

This verification is done by sending an email to the email address used during subscription which will contain a verification link. When the customer clicks on this link it's then considered that they have given their permission to receive email newsletters from you.

Regardless of how many campaigns a customer is subscribed to, if they **unsubscribe from a campaign they are considered unsubscribed from all your campaigns**. For this customer to receive any future email newsletter campaigns they will need to grant **their permission to you again**.

You can send a request to them by viewing their subscription details under their customer record.



When you add or import customers into the system for the first time you **will not need to request their permission**. In this scenario you undertake that every customer added or imported **has given their prior permission** to receive email newsletters from you. But again if they unsubscribe from a campaign then you will need to request permission from them to resume your communications.

9.5. Advanced Topics and Techniques

Customizing the Subscription Message

By default a system message is displayed every time a customer subscribers to a campaign list. You can customize this message via **Admin -> More Customization Options -> System Messages**.

You can also configure your subscription form to go directly to a web page that you designate. This web page can be hosted with Your Online Business or a 3rd party hosting provider.

To do this you need to append the following to your web form's action URL:

e.g.

action="/CampaignProcess.aspx?........"

change to:

action="/ CampaignProcess.aspx?........&PageID=/Results.htm"

Another technique is to go back to the same page where the subscription was made from and display a confirmation message next to the subscription form. To do this: change to:

action="/ CampaignProcess.aspx?........&PageID=Origin"

And next to the Submit button in the subscription form append: { module_url,error }. This is where the confirmation message will appear.

Customizing the Unsubscribe Message

By default a system message is displayed when customers unsubscribe from your campaigns. You can customize this message via **Admin -> More Customization Options -> System Messages**. If you wish to redirect to a different web page then you will need to add your own META REFRESH tag or javascript redirect to the source of this confirmation message:

Javascript example:
document.location = '/yoururl.htm';

Customizing the Unsubscribe link in Campaigns

It's not possible per se to customize the unsubscribe link. However when you add the {tag_unsubscribe} to your campaigns the system will only display the word **Unsubscribe** in your campaign. This approach enables you to append your own words around this to customize the unsubscribe option e.g.:

If you wish to be removed from this campaign please {tag_unsubscribe} here.

10. ECOMMERCE AND ONLINE SHOPPING

10.1. Introduction

More and more businesses are selling their products online. Selling online gives businesses a much wider reach to potential customers. Some of the main benefits of selling online are the significantly lower cost per transaction and the around the clock availability of the online shop. This system has a powerful e-commerce engine built into it that puts business owners in control and enables them to easily sell their products online. What distinguishes this system from the myriad other e-commerce systems in the marketplace is its integrated customer database. The customer database automatically captures customer purchases and gives business owners a 360 degree view of all their customer interactions.

Some of the key features of this e-commerce system include:

- Ability to setup an unlimited number of catalogues and products
- Sell products in many currencies
- Sell e-products such as electronic documents and music
- Granular Customizability of the shopping and checkout experience
- Customer Loyalty Programs, e.g. discounts for each customer
- Get-A-Quote option
- Integrated customer database
- Product Grouping feature
- Cross and Up-selling via Related Products
- Customizable shipping options, e.g. by weight or volume
- Create tax codes for products/countries
- Integrated with the major payment gateways including PayPal
- Affiliate Programs for traffic generation and tracking
- Inventory Control
- Discount Codes
- SSL Security Certificate
- And many more!

10.2. Catalogues and Products

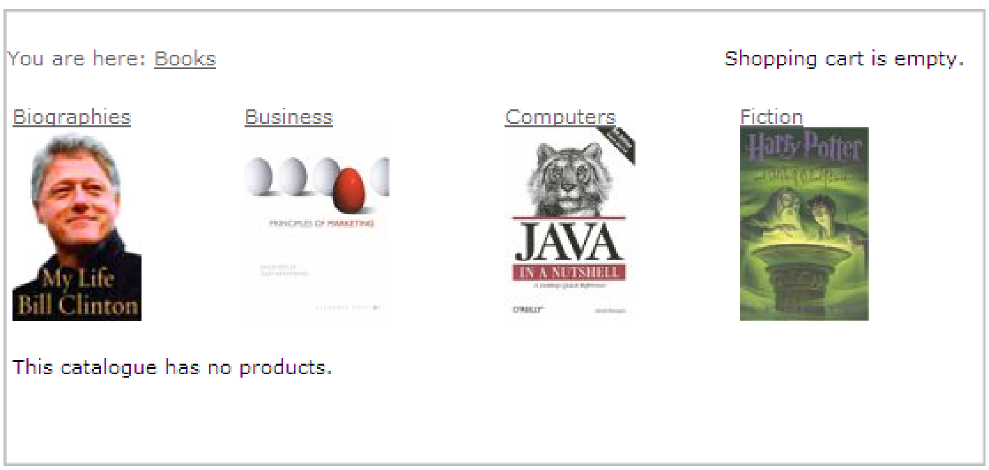
Before embarking on selling your products online, it's important to understand the concept of Catalogues and Products. Products are the "things" you sell. If you are a music store, then your products include DVDs, CDs and so forth. Catalogues on the other hand are "buckets" of like products which customers can easily browse and buy.

For example if you were selling music online, then your catalogues may include:

- Rock
- POP
- Jazz
- Classical
- Etc

You would assign all your Rock albums to the Rock catalogue. A customer browsing your website who was interested in Rock music would select the Rock catalogue and see all the Rock albums.

There is no limit as to how many catalogues and products may be created.



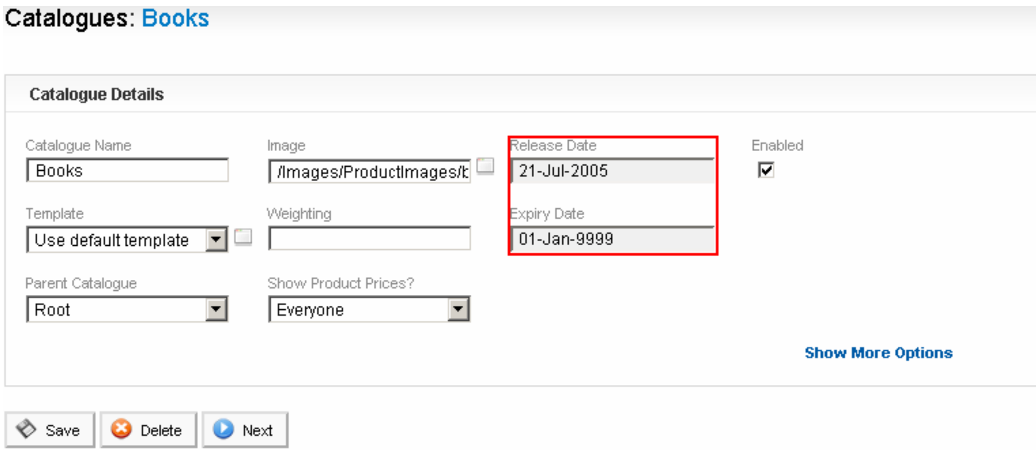
10.3. Assigning Products to More than One Catalogue

Products may be assigned to more than one catalogue. It's unlikely that you will assign a Rock album to the Rock and Classical catalogues. However from time-to-time you can create new Catalogues other than those mentioned above and assign existing products to them.

For example, when approaching the Christmas period, you may want to create a Catalogue called "Christmas Specials" and assign any album that is on special during this time to this Catalogue. When a customer visits your website and choose to view the contents of this catalogue they will see all albums that you've assigned to it, including Rock and possibly Classical albums.

10.4. Release and Expiry Dates

The system allows you to set a release and expiry date for all catalogues and products. For example, a Christmas Catalogue may have a release date of 1-Dec and an expiry of 30-Dec. This set-and-forget approach enables you to setup catalogues and products in advance and have these appear on a website at a given date and then automatically be removed when the expiry date is reached.



10.5. Catalogues and Sub-Catalogues

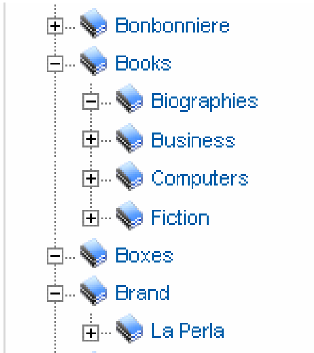
There are many ways of organizing your online shop. An important concept is that of sub-catalogues. Creating sub-catalogues is a way of creating a hierarchy around catalogues to make it more intuitive for customers to find what they are looking for.

Customers searching for Rock music may be looking for: American, Australian or British Rock music. By creating sub-catalogues, and assigning the relevant albums to each sub-catalogue, customers can easily find what they are looking for.

This may be a typical hierarchy for our online music store:

- Rock
  - American
  - Australian
  - British
- Classical
  - Renaissance
  - Baroque
  - Romantic
- Etc

This is another example of a catalogue hierarchy:



When a customer chooses a top-level category, e.g. “Rock”, then will see any sub-catalogues and any products assigned to this catalogue. So in this case they will be able to instantly narrow down their search by choosing “American”, “Australian” or “British”. It’s less likely that a top-level catalogue which has sub-catalogues would also contain products, but it is also possible to assign products at this level.

10.6. Setting up Your Online Shop

Now that we have covered off the topics most important to selling online, we are now ready to begin to setup our online shop. As we proceed through this chapter we will discuss all the features built into this e-commerce system.

To setup, we will need to:

- Decide on the catalogue hierarchy
- Understanding the complexities of selling online
- How to deal with a global audience
- Create our tax codes (if required)
- Create our shipping options (if required)
- Create a Product Import file (if required)
- Setup our payment gateway (if required)
- Customize the online shop and checkout process (if required)

Decide on the catalogue hierarchy

This is potentially the most important decision that you can make when setting up your online shop. Organizing your products within an easy-to-understand set of catalogues ensures customers can find what they are looking for quickly. This also leads to a greater percentage of completed carts rather than abandoned carts. So spend the time up-front to create a list of catalogues and sub-catalogues that make sense for your business and that you can easily assign your products to them.

Understanding the complexities of selling online

One of the complexities of selling online is the lack of identifiable geographical boundaries. Not knowing exactly where your customers are from can affect many things, including how you should present your online shop, the currency to sell your products in, shipping options for customers in different countries as well as your payment gateway.

For example, imagine if you are a music store in Australia, you may want to ask yourself the following question “do you want to sell your products only in Australian Dollars ($AUD) regardless of whether your customers are in Australia, America or Asia? Or do you want to address each one specific to their country of origin, e.g. your American customers see prices in $US dollars and your European customers will be presented with Euro prices”?

Both options have many pros and cons that require careful consideration upfront. Here’s a matrix to help you get started.

Sell to anywhere in the world in one currency only	**Sell to anywhere in the world in different currencies**
Quick to setup	More complex, time consuming and costly to setup
Only need one payment gateway	May need a payment gateway for every currency (check with gateway and bank). Can you use PayPal which supports more than one currency
One set of shipping options for all customers to chose from	A different set of shipping option for each country that you sell to
Need to setup tax codes for one country (only if required)	Need to setup tax codes for every country that you sell to (only if required)
Customer sees one currency and will be charged in that currency	Customer will see currency relevant to them and will be charged in that currency

Most businesses chose to sell their products in their local currency to their customers, regardless where in the world their customers come from. The obvious downside is that the customer has to buy in the currency in which the business operates in, but this problem can be alleviated by providing links to currency calculators.

The primary driver why businesses opt for this option are: 1) it’s much faster and easier to setup for this scenario, 2) the cost to setup merchant accounts to accept multiple currencies and engaging the relevant payment gateways becomes prohibitive.

How to deal with a global audience

If you decide to sell your products in one currency to all customers, then you can skip this section. Otherwise you will need to familiarize yourself on how this system works in a multi-currency configuration.

There are many ways to detect where a customer is from, but the most widely method is to ask customers to choose the country that they are from. You may have noticed when visiting an ecommerce website that you are presented with a dropdown to choose your country or currency. Once you've done this, the rest of the shopping experience is then customized based on your selection.

Imagine your company's domain is: www.yourcompany.com and you are located in Australia and sell in Australian dollars. When you add your domain to the system, you need to choose a country that this domain is associated with. You would choose Australia.

When you add products to your online shop, for each product you add a price in Australian dollars. When customers enter your website using this URL, the system automatically detects that this domain is associated with Australia and only Australian product prices are displayed for products inside your online shop. So it's important in this scenario that every product has an Australian price.

Now imagine if you want to sell to American customers in $US dollars. You need to configure your online shop for this scenario. Here's a simple plan:

- You must create a sub-domain, e.g. us.yourcompany.com and add this to the system. Ensure you chose USA as the country that is associated with this URL.
- Ensure you enter US prices alongside Australian prices for every product

When customers enter your online shop you can display a dropdown that allows them to chose their country, e.g. Australia or USA. If the chose USA you will then redirect the customer to us.yourcompany.com. The system will then automatically only show $US prices, US Tax codes and so forth. Even when the customer checks out, only shipping options associated with US will be displayed.

This simple HTML code is for a dropdown that redirects to different URLs based on the country the customer picks e.g.

```
< select onChange="document.location=this.options[this.selectedIndex].value;">
< option value=http://www.yourcompany.com>Australia</option>
< option value=http://us.yourcompany.com>USA</option>
< /select>
```

You can also use JavaScript to automate the country selection if you wish. Keep in mind that although this method is relatively accurate, from time to time it may not be. One of the system's built-in modules displays the user's country code. You can write some basic JavaScript that uses this and redirects based on the current customer's country.

e.g.

```
< script language="javascript" >

var country = '{ module_visitorcountrycode }'; // e.g. var country = 'US';

switch (country) {
  case 'US':
     document.location = 'http://us.yourcompany.com';
     break;
  default:
     document.location = 'http://www.yourcompany.com';
     break;
}

< /script >
```

You can even use cookies to save this information and use it for future visits by the same customer.

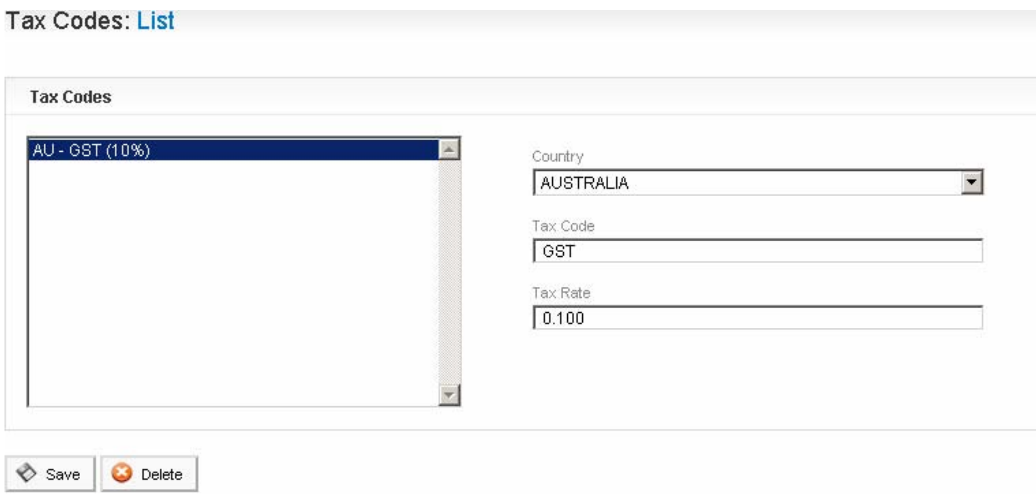
Create tax codes

It's entirely up to you whether you want to include tax as part of the product price or wish to have it as a separate item. By setting up tax codes and assigning these to products, the system is able to display and add the relevant tax for each product.

Here's an example of how this works and your options:

- You setup a new tax code, e.g. VAT with a value of 10%
- For every product that you add to the system, you add its sales price as ex-tax, e.g. $20 and chose VAT as the tax code applicable for this product
- When the customer views the product in the online shop, they will see the price as $22 ($20 + 10% tax). You can even chose to show the tax component as a separate item for further clarity.
- Alternatively you can avoid setting up your tax code and enter the product sale price as $22 which includes the tax in the price.

You can customize your tax does via: Content->Catalogues->Options (top-right)



Create our shipping options

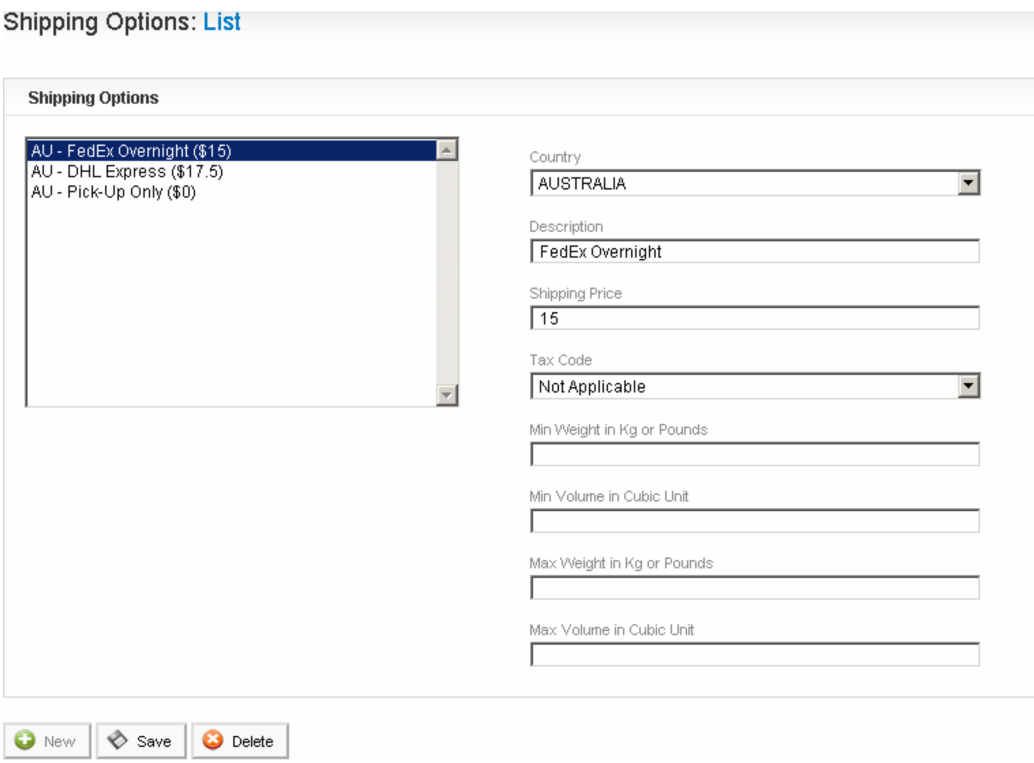
Setting up your shipping options is trickier than meets the eye. You need to have a good overview of the type of products that will be sold through your online shop. You are then in a position to identify all the shipping options relevant to you. When deciding on shipping options consider the following:

- Weight of products
- Volume of products
- Destination to which the products are being sent to

The system is able to calculate the relevant shipping for an order based on the above criteria. The weight/volume components are optional. As you add products to the system, you are able to add their weight and volume. You can equally provide weight and volume restrictions to a shipping option. When a customer buys products through your online shop, the total weight and volume of an order is first calculated and then only the shipping options that meet that weight/volume combination are presented to the customer. Keep in mind if a product does not have a weight/volume is specified, it's considered to have no weight or volume when it comes to presenting shipping options.

If you are addressing customers from each country separately, then only shipping options for the current country (based on the current URL the customer is using to shop) will be displayed to that customer.

You can customize your tax does via: Content->Catalogues->Options (top-right).



Create a Product Import file

There are two ways to keep your online shop up to date. The first option is to use the web-based Administration interface to add and remove products. This approach gives you access to the full range of features available when adding products. The downside however is that as the number of products within an online shop increases this process can become slower and tedious.

You can equally manage your entire product catalogue using an Excel file. This is the recommended approach. By referring to the Product Import file template you can add 1000's of products to this file and easily add, update or delete them within the system by way of importing this file. You can import this file as many times as you like. This approach is extremely quick and gives shop owners the flexibility they require to keep their online shop up to date. Keep in mind, the import file allows you to import all the key information associated with products. However some information cannot be imported via this method and needs to be entered manually. Please refer to the Product Import file template for full details and instructions.

You can find this in: **Admin -> Import Data -> Products**.

You can also export your entire product catalogue to Excel. You will find the link to export in the Import section.

Setup our payment gateway

To accept payments online you need a relationship with a payment gateway. A Payment Gateway is a service that authorizes and processes payments for online retailers in real-time. It is the equivalent of a physical POS (Point-of-sale) terminal located in most retail outlets. Payment gateways encrypt sensitive information, such as credit card numbers, to ensure that information passes securely between the customer and the merchant.

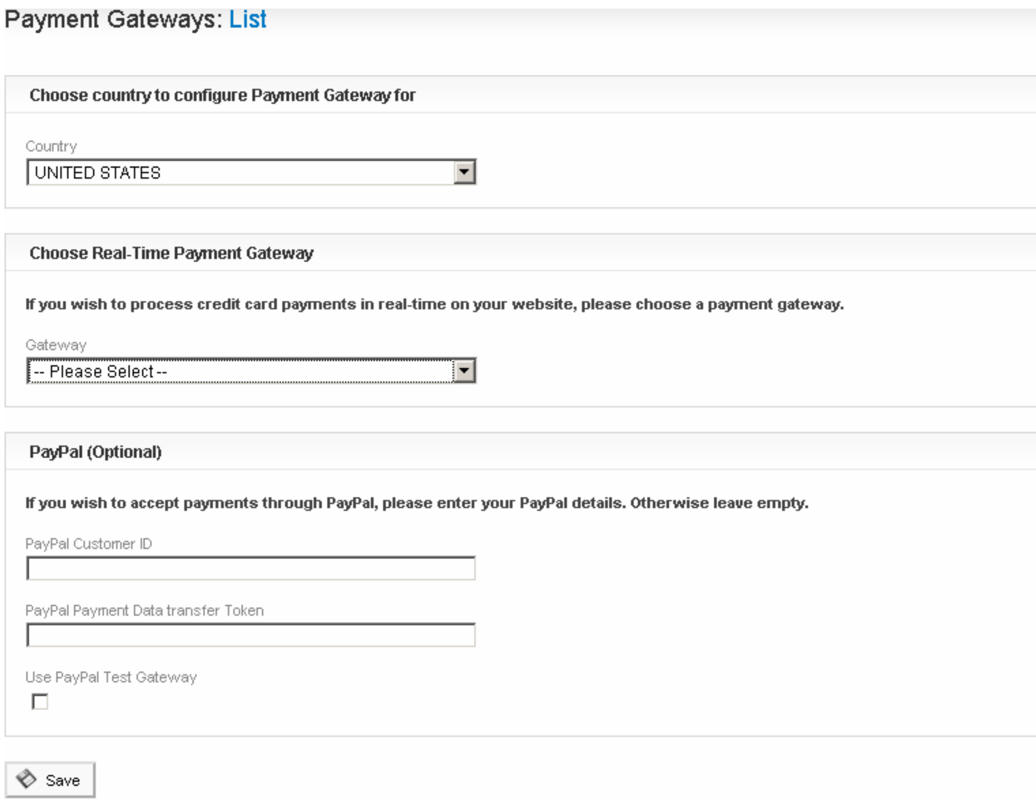
This e-commerce system supports most popular payment gateways in US, UK, Australia, New Zealand, South Africa, Malaysia and Singapore. Other countries are being added over time.

There are a couple of key decisions that need to be made in regards to payment gateways when deciding to setup an online shop.

1) Are you going to use a seamless or a non-seamless payment gateway? A seamless payment gateway is one that processes credit cards directly on your online shop website without redirecting the purchasing customer to any 3rd party website. The whole transaction is seamless and takes place in real-time. On the other hand a non-seamless payment gateway such as PayPal will redirect the purchasing customer to the PayPal website to process the payment and will redirect the customer back to the online shop after this has been completed.

2) Are you going to sell in many currencies or one currency? It's likely that for every currency you wish to sell in, you will need a payment gateway account as well as a relevant merchant account with your bank that accepts that currency. However refer to any of the supported payment gateways or your bank for details.

NOTE: It's important to note that non-seamless payment gateways adversely affect the successful completion of online shopping transactions. Customers are often frightened by the fact that they are redirect to a 3rd party website and terminate the transaction. In other instances the prolonged nature of these transactions can also affect the customer's desire to go ahead with the sale. As such it is our recommendation that customers use a seamless payment gateway. The pro of a payment gateway such as PayPal is that it accepts payments in many currencies and is extremely affordable.



<u>Customize the online shop and checkout process</u>

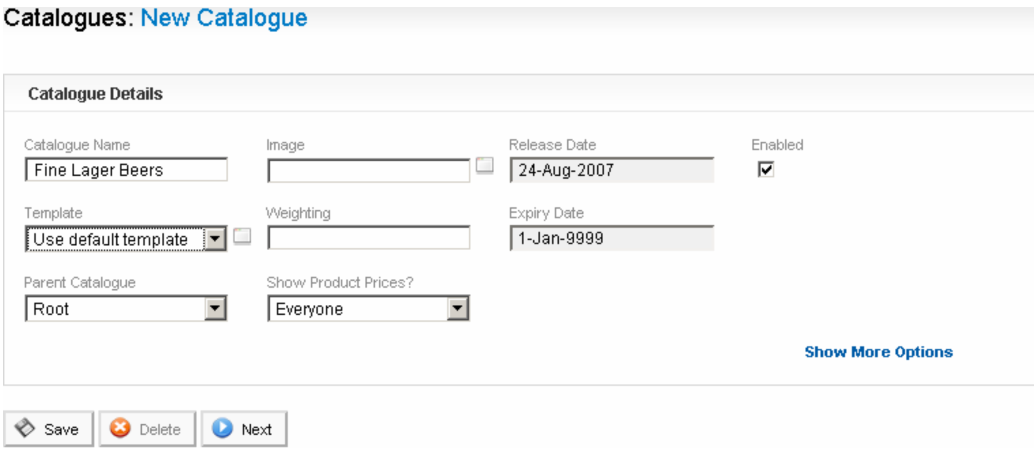
Your online shop is already customized and ready to sell for you. However one of the main benefits of this system is the level customizability that it provides to website owners. When setting up your online shop you need to consider whether the online shop needs any further customization over and beyond what is already provided to you.

Although the how-to of this customization is covered in a later topic, it's important to note that it's possible to make very fine-grained customization to the online shop.

10.7. Catalogues

By now you should have decided on the list of catalogues and sub-catalogues that you need for your online shop. Now it's time to add them to the system. Creating catalogues is a simple and painless process. Go to **eCommerce -> Catalogues** and select **Create New Catalogue**. Enter the details for your catalogue and select **Save**.

For most catalogues, that's all it takes to create them. Below is a list of some of the extra features pertaining to catalogues that you can use.



Weighting/Order
You can use this field to control the order in which a catalogue's sub-catalogues appear in. Customizing this is discussed in further details below. However sub-catalogues are either displayed in Alphabetical or Weighting order. If you use Weighting then any catalogue with a higher weighting is displayed first.

Pricing Option
By default the price of products is displayed to every customer. You can however choose to only show prices to existing customers only for any product within this catalogue, e.g. resellers or partners. This is different to a Secure Catalogue as with option any customer can view this catalogue except that prices are hidden.

Secure Zones
You can make any catalogue secure by assigning it to one or more member-only areas. Only customers who are subscribed to the same member-only areas will be able to browse the catalogue.

Role Responsible
You can configure a Role (which consists of users) to be responsible for a catalogue. If a catalogue has release and expiry dates set, then 7-days before an expiry is reached, any user in this role will be notified.

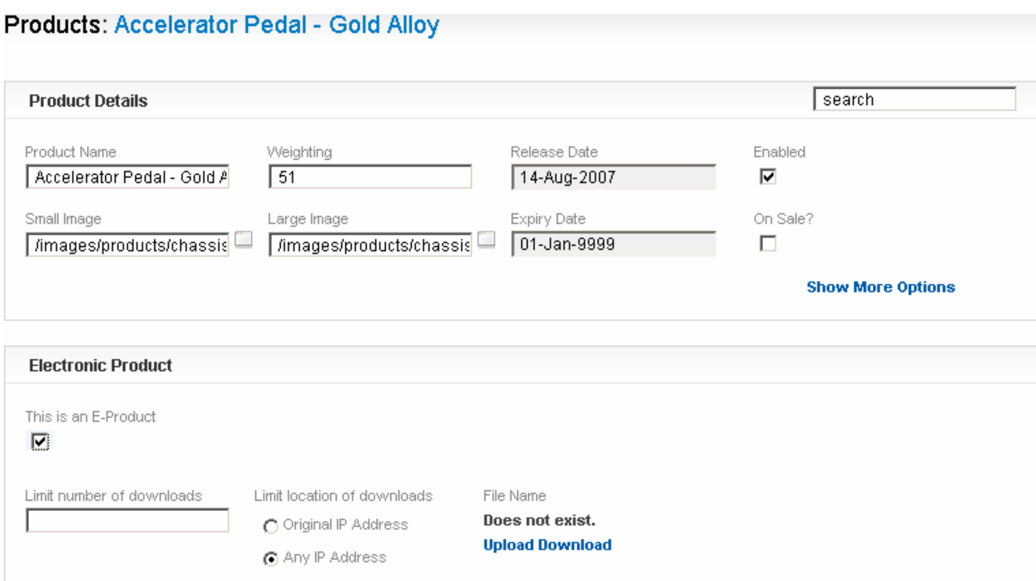
10.8. Products

Setting up of your online shop and creating your catalogues is generally done upfront. After you've completed these tasks, you rarely need to go back to make further adjustments. Most of your time henceforward will be spent managing products and processing online orders.

Creating products is an equally simple and painless process. However many more options apply to products and it's important to familiarize yourself with those. As discussed earlier, it's important to decide whether you will be using the web-based Administration interface or the Product Import file for the management of products of your online shop.

Here are a few key points that you should consider when creating products:

- Is this a physical product or an e-product such as PDF document or an MP3 file?
- Do you require inventory control for this product? i.e. the system tracks number of products in inventory and can stop the sale of a product when it's out of stock
- Is this product part of a group? Product Grouping is a highly useful and intuitive way to organize your products, e.g. the same t-shirt that comes in small, medium and large products can be grouped together.



E-Products

Making any product an e-product is a matter of selecting the **This is an E-Product** checkbox. You will then be presented with an option to upload your E-Product and set your limitations around the downloading of this file. When a customer purchases an e-product, if the payment is successful the customer is able to instantly download the product via a link included in the email invoice.

It's important to note with some payment gateways such as "Offline Processing", the payment is initially put in "pending" status until manually confirmed by the site owner, e-products within the order cannot be downloaded under this circumstances until the payment is confirmed as "successful".

Inventory Control

For most online shops inventory control will not be required. From time-to-time however you will need to track inventory for products. This system allows you to track inventory for every product. Inventory control allows you to do the following:

- Stop the sale of products when the product is out of stock
- Allow an out of stock product to be pre-ordered
- If a product reaches its inventory stock threshold then you can be notified

Product Grouping

Product grouping is an essential part of your online shop although it may not apply to every online retailer. Imagine an online store that sells facial creams, each type of facial cream comes in 50ml, 100ml and 200ml tubs. Your customers' shopping experience is significantly enhanced when you reduce the number of similar items in a catalogue by grouping those products together.

When a customer browses the Facial Cream catalogue they will only see one type of each cream. With each cream they will see an option to choose between the different tub sizes.

Weighting/Order

Similarly to catalogues you can use the Weighting field to control the order in which products appear within a catalogue. Using this field is highly useful as you can ensure your most popular products are displayed first followed by least popular products. If you use Weighting then any product with a higher weighting is displayed first otherwise products are displayed in Alphabetical order or any other sort option that you choose when customizing the online shop.

10.9. Adding Catalogues and Products to your Website

So you've created your catalogues and products how do you now allow customers to browse them? There are a number of ways to allow customers to access your online shop. It's important to have a good understanding of this section to ensure your implementation is optimum.

But before you go any further please endure that you assign every product to at least one catalogue. In fact products cannot be purchased by customers unless they belong to a catalogue.

There are a number of ways to add products to catalogues.

- You can choose a catalogue via eCommerce -> Catalogues and choose the "Add products to this Catalogue" link from Action Box and assign one or more product to the catalogue
- You can choose a product via eCommerce -> Products and choose the "Add this Product to a Catalogue" link from Action Box and assign the product to one or more catalogues
- Or you can define the catalogues a product should be assigned to in your Product Import file. Refer to the Product Import file template for instructions.

Adding Catalogues to your website's Navigational Menus

The most common way to link to your online shop is to add a link for a catalogue to your website's navigation menu, e.g. create a menu item called "Online Shop" and link this to your main top-level catalogue. If you have more than one catalogue, you can create a separate menu item and link to each one.

You can retrieve the URL for each catalogue via eCommerce -> Catalogues or alternatively you can use the Link Manager and pick the catalogue to link to, the system will automatically create the relevant hyperlinks.

Adding Catalogues to Web Page

You can also manually add single catalogues to any web page by clicking on Add Catalogue to a web page in the Action Box or by using a Triangle. To add a Catalogue to a web page, go to ECommerce -> Catalogues and choose your catalogue. Click on the **Add Catalogue to a web page** in the Action Box and use "1-Click Insert" drop down and drop the catalogue onto a web page.

Adding Products to Web Page

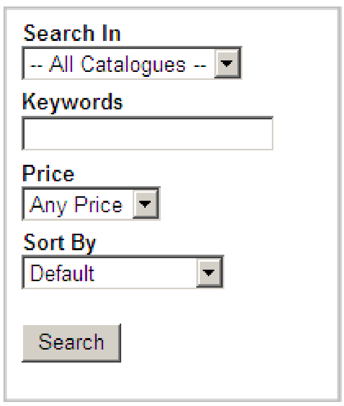
Adding individual products to a web page is achieved in the same manner as adding individual catalogues to a web page. However individual products should ever only be added to web pages where a product is on special or you want to highlight a product, such as the product of the month. In all other instances you should instead provide a link to the relevant Catalogue that then enable customers to browse and view the products contained within them.

10.10. *Adding a Product Search Function to your Website*

The system allows you to implement sophisticated product search functionality with just a few clicks of the mouse. The product search feature allows customers to:

- Search for products within all catalogues or within a particular catalogue
- Enter keywords to search a product name or product code
- Search and specify a price range for the products
- Sort the results in a number of sorting options available

The search functionality can be added to any web page. Ideally you may want to add this to your online shop's overall template so as customers browse the catalogues they can just easily search for products.



<u>Specifying the Web Page to display search results on</u>

By default, the search results for a product search module are displayed on the same web page where the search module was inserted. You will notice **{ module_productresults }** appended below the product search form. However you can customize and have the search results appear on a different web page. If you add the module to a template, then you must customize the form to specify the web page to display the results on.

To customize, add your product search form to any web page and go into the HTML view. Locate the opening <Form> with this action URL:

action="/Default.aspx?A=ProductSearch&PageID={ module_oid }">

Replace PageID={ module_oid } with ID=URL of your results page. Your web page URL must start with a slash (/). E.g.

action="/Default.aspx?A=ProductSearch&ID=/Results.htm">

Editing Price Range Criteria

When the form is inserted into a page it will include a default set of price ranges that customers can search through. But you can easily change this to suite your online shop. After adding the form to a web page, go into the HTML view and locate:

```
< select class="cat_dropdown_small" id="CAT_ProductPrice"
                        name="CAT_ProductPrice" >
    < option value="-1,-1">Any Price</option>
    < option value="0,50">$0-$50</option>
    < option value="51,100">$51-$100</option>
    < option value="101,150">$101-$150</option>
    < option value="151,200">$151-$200</option>
    < option value="201,300">$201-$300</option>
    < option value="301,-1">Over $300</option>
< /select >
```

Simply use the same format as above but change the prices to suite your needs.

Sorting of Results

When you customize your online shop you can specify the sort type in which products appear in. This is discussed in the Customizing the Shopping Experience section. These are the sort types available:

- Weighting – Your own custom order
- Alphabetical
- Date – Newest Products first
- Price – Least price first

Note: The Product Search module is different to the website Search module. You can find the former module under **Module Manager** where the latter is found under the **Modules -> Site Search.**

Customizing Product Search Results Module

Similarly to the product and catalogue list modules discussed below the product search results module can be customized.

When you first insert this module onto a web page it will appear as:

{ module_productresults }

This module can take the following inputs:

{ module_productresults, rowLength, targetFrame, resultsPerPage }

rowLength – Number of products per row

targetFrame – e.g. _blank. Specify the frame you want the product to open in

resultsPerPage– Number of products per page

E.g.

{ module_ productresults, 4, , 12 }

10.11. Buy vs. Quote

This e-commerce system provides functionality for customers to either buy products or request a quote. Both options are useful and depending on your business you can have both or choose the one relevant to you.

Buy

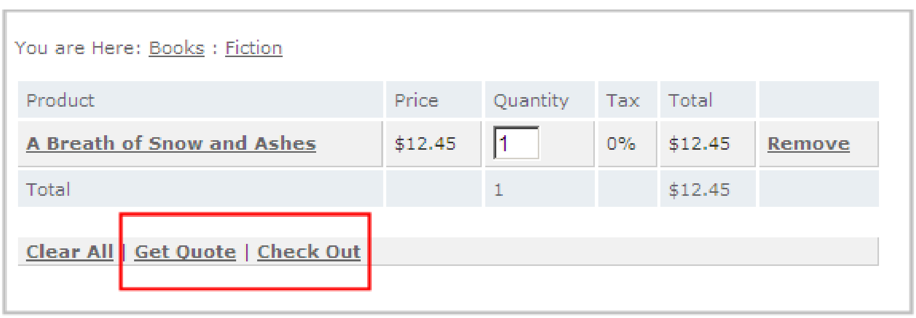
If the purpose of your online shop is to sell products and take payments then you should use this option and not include the "Quote" button in the Shopping Cart step of the Checkout Process (step 1). When customers choose to buy a product, they will be asked to provide a payment for the purchase.

In this option, the system will create an Invoiced Order which is emailed to customer upon the completion of the order. The Invoice template is used when emailing customer.

Quote

This option is useful for those retailers that want their customers to request quotes instead of purchase and pay for goods online. For example if you are a retailer which provides bulk discounts or need to make calculations before knowing the final price of an order, choosing this option will be more valuable.

In this option, the system will create a Quote Order which is emailed to customer upon the completion of the order. The Quote template is used when emailing customer.



Configuring Buy or Quote modes

To change the online shop and enable or disable one of these options:

- Go to **Admin -> More Customization Options -> Online Shop Templates** and choose the **Shopping Cart**.
- Change { module_shoppingcart } to:
    - o Buy mode only: { module_shoppingcart,buy }
    - o Quote mode only: { module_shoppingcart,quote }
    - o Leave unchanged for both

10.12. *Customizing the Shopping Experience*

One of the main benefits of this system is your ability to customize the shopping experience on a very fine-grained basis. Although the shopping experience is already customized and ready to be used, you may from time-to-time need to customize it further.

There are a number of templates that control the entire look and feel of this e-commerce system. Before you begin, you should understand the hierarchy of templates within the system as discussed below.

Customize: Online Shop Templates

Customize Overall Shopping Experience	
Main Catalogue Template	Main layout of how catalogues and products are displayed on a web page to your customers

Customize Catalogues and Products Elements	
Individual Catalogue	Customize how a catalogue is displayed on the "Main Catalogue Template"
Individual Product (Small)	Customize how a product within a list of products is displayed on the "Main Catalogue Template"
Individual Product (Large)	Customize how details of a product are displayed on the "Main Catalogue Template"

Customize Check-Out Process Experience	
Shopping Cart	Step 1: Product details within the Shopping Cart
Registration (Buy)	Step 2: User enters their details including payment to finalize purchase
Registration (Quote)	Step 2: User enters their details to finalize quote
Receipt (Buy)	Step 3: Receipt for payment after the purchase is finalized
Receipt (Quote)	Step 3: Receipt for quote after the purchase is finalized

Catalogues & Products Template Hierarchy

Just like all types of content, e.g. Web Pages, FAQs and Announcements that use a site-level template, Catalogues also use the same site-level templates. This ensures a consistent look and feel across your entire web site.

In order to give you complete freedom and granular customizability, templates use a number of other smaller templates to control:

- How Catalogues, Products and the Shopping Cart Summary sit on the same page
- How many Catalogues sit on each line
- How each individual Catalogue appears, e.g. Catalogue Image and then Catalogue Name below it OR Catalogue Name and then Catalogue Image below it
- How many Products sit on the each line and on each page
- How each individual Product appears, e.g. Product Image, then Product Code, then Product Price and then Product Name below it OR Product Name and then Product Image and then Product Price and then Product Code

Main Catalogue Template

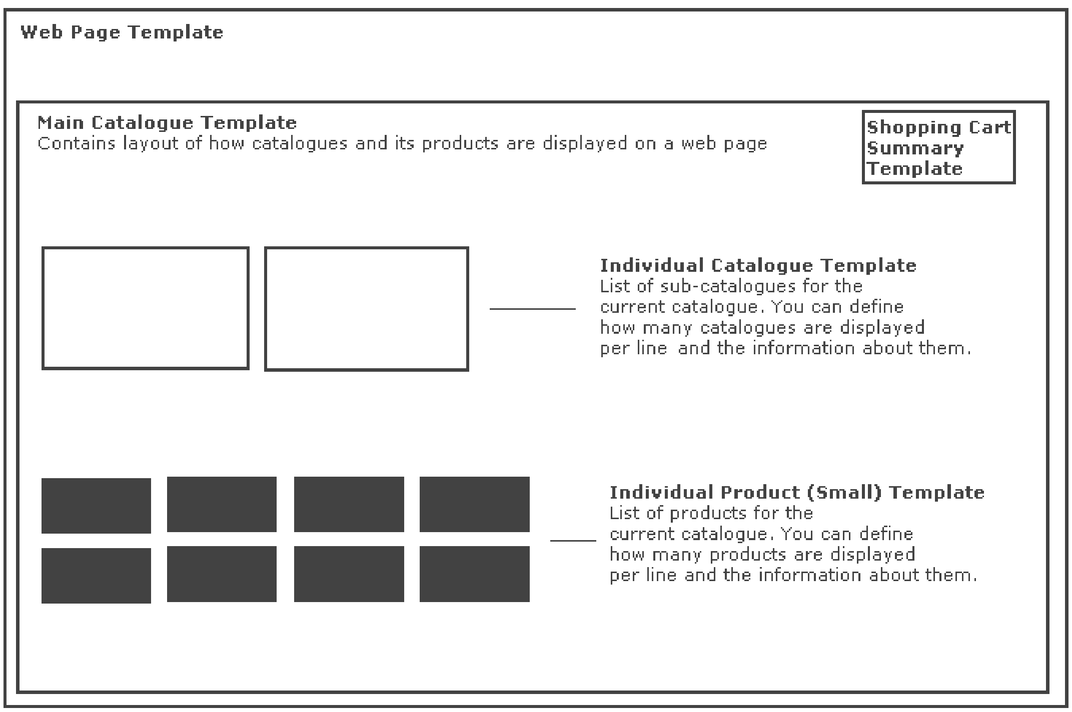
The **Main Catalogue Template** is used when displaying catalogues and products to customers. This template effectively handles the layout of catalogues and products on the page. You can configure the number of products per row, per page and so forth.

This template is used for layout rather than aesthetic purposes. In order to ensure a consistent look and feel for your website, this template is wrapped inside the site-level templates found in Admin -> Manage Site-Wide Templates.

Imagine your “Cream” catalogue to have a number of sub-catalogues, e.g. “Facial” and “Moisturizers”. The “Cream” catalogue also contains a handful of its own products. When a customer views the “Cream” catalogue, the Main Catalogue Template will be retrieved and placed inside the site-level template.

Any sub-catalogues are displayed in the white-boxes below. You can customize individual catalogues and limit the number of catalogues per row.

Any products in the “Cream” catalogue are displayed in the black-boxes below. You can customize individual products and limit the number of products per row and per page.



There are 3 main elements to the Main Catalogue Template.

1. The header which consists of Catalogue Breadcrumbs and Cart Summary modules
2. The list of sub-catalogues in the current catalogue
3. The list of products in the current catalogue

By organizing and customizing the above elements and using your own CSS classes you can completely customize the entire online shopping look and feel.

Other important elements on this page include the Shopping Cart Summary module, previous and next links and so forth. These are discussed in later topics of this chapter.

Customizing how sub-catalogues list appears

{tag_cataloguelist, rowLength, targetFrame, notUsed, sortType, hideEmptyMessage}

rowLength – Number of catalogues per row

targetFrame – e.g. _blank. Specify the frame you want the product to open in

notUsed – this field is not currently used. Leave empty.

sortType –

- Alphabetical
- Weight (Defaut)

hideEmptyMessage – if a catalogue does not have any sub-catalogues you will see a message "This catalogue has no sub-catalogues." You can hide it by setting it to true.

E.g.

{tag_cataloguelist, 4, , , Alphabetical, true}

Customizing how product list appears

{tag_productlist, rowLength, targetFrame, resultsPerPage, sortType, hideEmptyMessage}

rowLength – Number of products per row

targetFrame – e.g. _blank. Specify the frame you want the product to open in

resultsPerPage– Number of products per page

sortType –

- Alphabetical
- Price (Cheapest to most expensive)
- Date (Newest to oldest)
- Weight (Default)

hideEmptyMessage – if a catalogue does not have any products you will see a message "This catalogue has no products.". You can hide it by setting it to true.

E.g.

{tag_productlist, 4, , 12, Alphabetical, true}

Individual Catalogue Template

This template allows you to customize the appearance of an individual catalogue. For example when viewing the “Cream” catalogue, you will two sub-catalogues “Facial” and “Moisturizers”. The appearance of each of these sub-catalogues is controlled by this template.

This template provides very granular customization as individual tags are used to display information about the catalogue. These can be placed anywhere on the page and use a CSS class of your choosing.

Small and Large Product Templates

These templates control how individual products are displayed in your online shop. When a catalogue is being browsed and a list of products being displayed, each product uses the **Small Product template**. When a customer selects a small product to view its details, the **Large Product template** is used to display the details of the product.

These templates provide very granular levels of customization as tags are used to display information about the different product attributes. Just like the Individual Catalogue Template, these tags can be placed anywhere on the page and use a CSS class of your choosing.

There are a number of tags that you can use to customize the look and feel of your product templates. Below is a list of some of the tags with a detailed description.

{tag_addtocart}, {tag_addtocartinputfield}

These two tags render out the Add to Cart button and the quantity box respectively. When a user clicks on the Add to Cart button, the number of items specified in the quantity box will be added to the cart. A standard confirmation message is shown after the user has added items to the cart.

You can customize the Add to Cart tag in order to display a different text on the button or even use an image:

- To change the button text simply change the tag {tag_addtocart} to {tag_addtocart,Your Text}.
- If you want to use an image instead change the tag {tag_addtocart} to {tag_addtocart,}. Replace the src="YourImage.gif" to a valid image path.
- If you want to foce the user to view the details of a product before adding it to the car then only add the tag {tag_addtocart} to the Large product template. This tag cannot appear more than once on the template.

Similarly the {tag_addtocartinputfield} enables you to completely position and customize the quantity box. This field uses a CSS class called ProductTextInput. Ensure this class is included in one of your external or inline CSS files.

{tag_buynow}

This tag renders a “Buy Now” button. This button can be customized in a similar fashion to the “Add to Cart” button. The main difference between this button and the “Add to Cart” button is that after the user adds an item to the cart, they are redirected to the “Shopping Cart” page where they can see the summary of their cart and checkout.

{tag_totalprice} and {tag_totaldiscountprice}

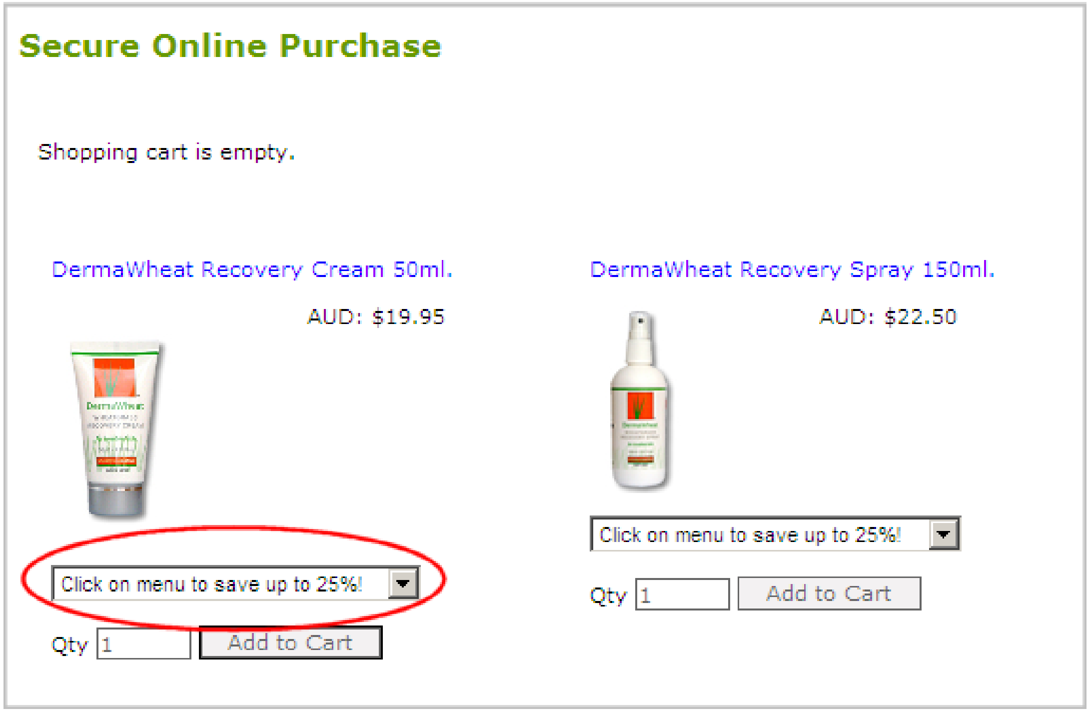
When adding a price for products it’s possible to add retail and a sale price. The retail price is only used for display purposes. Use this price to indicate to the customer that the retail price was X but now they can get the product for Y. Y being the sale price.

There are two tags that you can use to display the selling price of a product.

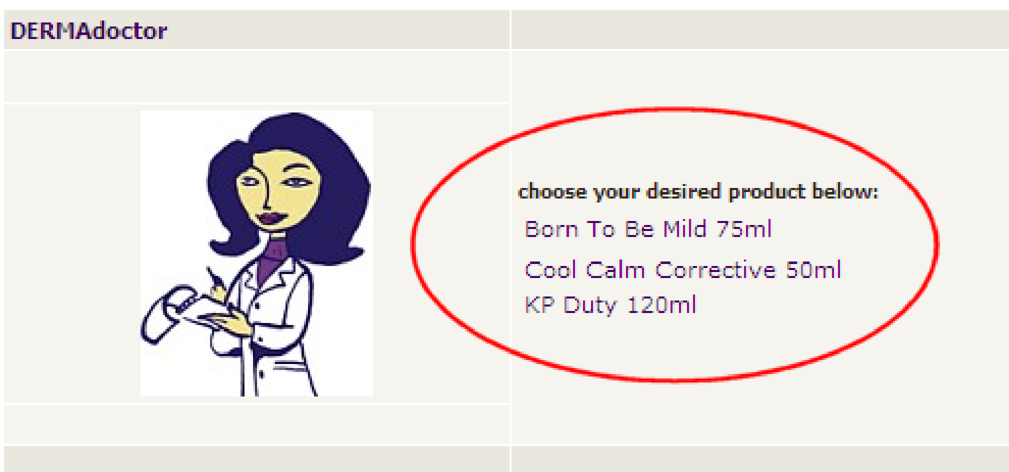
- {tag_totalprice} is the sell price of a product inclusive of any tax.
- {tag_totaldiscountprice} if you are using the customer loyalty features of the system, then you can provide each customer with their own discounts. If you add this tag to the page then any customer who has been given discounts will see a discounted price instead. If no customer is currently logged in or discounts do not apply, then they will see the same value used for {tag_totalprice}.

{tag_grouping} and {tag_groupinglist}

There are two grouping tags that may be used to display grouped products. The most common is **{tag_grouping}.** In the example below you will see different tub sizes for each type of Cream being grouped together.



The tag **{tag_groupinglist}** will instead display a list of the products within the group as shown below.

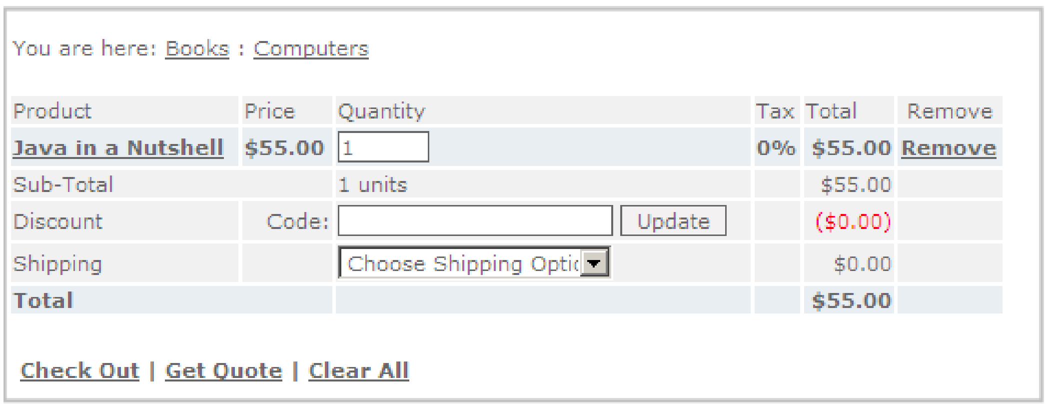


Checkout Process Templates

A number of templates are used during the checkout process. You have complete access to these templates and can customize them in detail. In January 2007 the checkout process went through a major revamp to incorporate a simpler, shorter and more concise flow inline with customer feedback. The new checkout process is based on evaluating conversions from previous years and is designed to maximize your online conversions.

The checkout process consists of 3 steps. It's important to note that the checkout steps for customers who wish to purchase vs. those wish to get a quote is different. This approach allows you to customize each flow to suit your business needs.

1. Shopping Cart Summary – details all the products in the cart including taxes, costs and total. This is where the customer chooses the relevant shipping options and/or discount codes. Every field, color, layout and options on this page are completely customizable. Please review the list of tags that can be used to further customize this step.

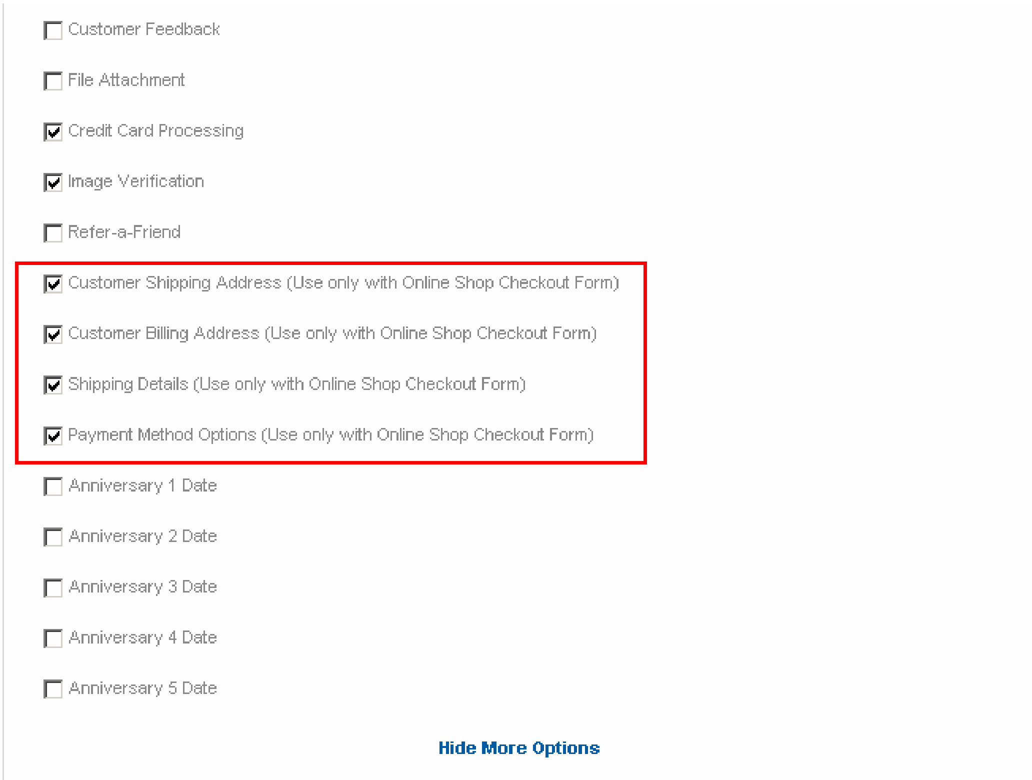


2. Checkout Form – this step collects customer details including addresses, payment details and the payment method.

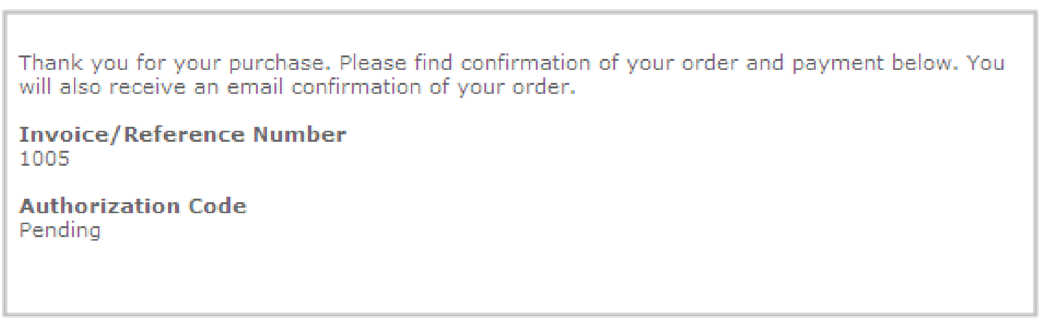
This form is completely customizable. To add new fields to this form simply use the web forms feature to create a new form with any number of fields and then re-insert the form into this step of the checkout process.

In the default checkout form you will notice 3 payment methods Credit Card, COD and PayPal. You can easily remove any payment method that you don't require. To remove COD for example, simply select it and click delete. If you are only using the credit card option you would delete COD and PayPal, ensure the Credit Card option is selected and present on your page. You can use CSS to hide this field, e.g. append style="display:none;" to the Payment Method element.

NOTE: Credit Card details and Payment Method are not required for the Quote checkout form.



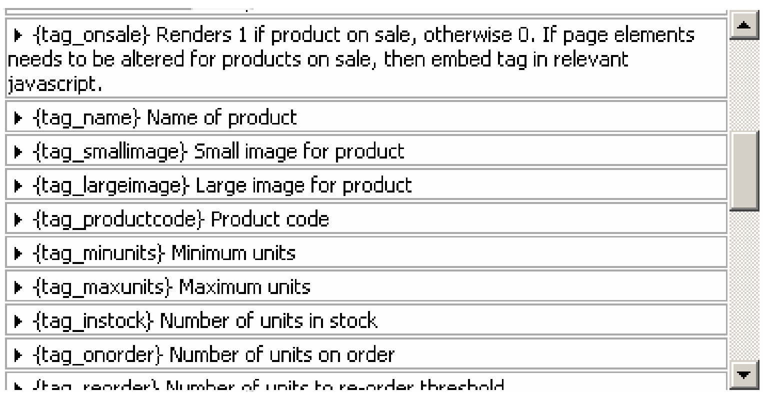
3. This is the receipt and confirmation page for the purchase or quote. This page is customizable and can include any number of transaction related information. Refer to available tags for this step.



Tag Manager

Tags are used to define what details about a Catalogue or a Product are displayed on their respective templates. Below is an example of what you would see when you select the **Tag Manager**. By clicking on one of the displayed Tags, it will be inserted into the Template. To ensure a better visual layout, Tags should be placed within a HTML table or div.

Note: The Tags displayed below are for the **Small Product Template** and may over time be updated. It is possible that there are now new tags that are not displayed in the screenshot below.



System Style Sheet Classes

There are a number of CSS classes that the system uses when rendering out various elements of the online shop. Most of these can be found in ModulesStyleSheets.css, however below is a list of them.

- catalogueTable – used for the table that surrounds the list of catalogues in the Main Catalogue Template
- catalogueItem – used for each individual catalogue in the above table
- productTable – used for the table that surrounds the list of products in the Main Catalogue Template
- productItem – used for each individual product in the above table
- productTextInput – used for the quantity textbox when adding a product to the cart
- productSubmitInput – used for the submit button when adding a product to the cart
- cartInputText – The class for the quantity textbox in the shopping cart summary step of the checkout
- shippingDropDown – The class for the shipping drop down in the shopping cart summary step of the checkout
- discountcodeInput – Input field for the discount code in the shopping cart summary step of the checkout

Earlier versions of the shopping cart also use these CSS classes (prior to 2007):

- cartSummaryTable – The table that surrounds the Cart Summary Module
- cartSummaryItem – The class for the text in the Cart Summary Module
- cartSummaryLink – The class for the link in the Cart Summary Module
- cartTable – The class for the Cart Table in the Shopping Cart / Checkout
- cartTitleItem – The class for the header items in the above table
- cartItem – The class for the items in the above table
- cartLink – The class for the links in the above table

10.13. Customizing Invoice and Quote Email

When customers purchase products or request quotes via your online shop they will receive a confirmation email which consists of the details of their purchase. Depending on which action they undertake they will either receive an Invoice or a Quote email.

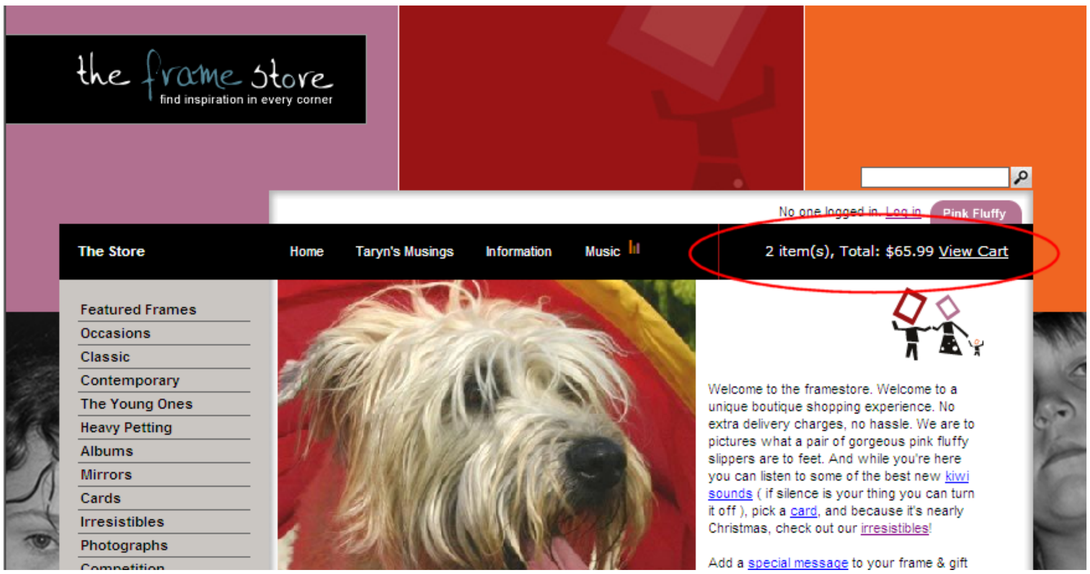
All aspects of these templates are customizable. You can find these in Admin -> More Customization Options -> System Emails. Equally you can use Triangle to edit these email templates.

10.14. Key Tags and Modules for your Online Shop

There are a number of key tags and modules that you can add to your web pages to enhance your customer's shopping experience.

<u>View Cart Summary Module</u>

This module will display a summary of the cart and its total value on the current web page as indicated in the image below by the red circle. This module can be placed on any web page but it's essential that it is included in the Main Catalogue Template of the online shop (refer to Customizing the Shopping Experience).



This module may be used in a number of ways:

{ module_shoppingcartsummary, layout, isQuote }

- Layout - Vertical or Horizontal
- isQuote - True or False. Sometimes you may want the cart summary module to be more quote friendly rather than purchase focused. Set this value to True to be more quote friendly or leave empty for default settings.

NOTE: This module can only be placed once on your page.

Catalogue Breadcrumbs Tag

Catalogue breadcrumbs tag is similar to the web page breadcrumbs module. It enables buyers to know where in the shopping area they are and easily navigate between catalogues. This tag can only be placed on the Main Catalogue Template and may only be used in the online shop of your website.

When this tag is placed in the Main Catalogue Template you can wrap it inside a HTML span and apply your own CSS class to it.

Checkout Link

This option is not strictly a module. You may want to create a hyperlink to the shopping cart checkout page which consists of the current cart's products and prices. The link for this page is: /OrderRetrievev2.aspx.

We however do not recommend using this. You should instead use the Shopping Cart Summary module (discussed above).

Previous and Next Links

As discussed earlier you can customize the number of products that appear per page in your online shop. You can place the {tag_previous} and {tag_next} anywhere on the Main Catalogue template to take advantage of the paging features built into this system. This links can be customized to display images, e.g.

{tag_previous, Go to Previous Page}
Or
{tag_previous, <img src="/images/previous.gif">}

10.15. Payment Gateway Types

This e-commerce system is already integrated with a number of leading payment gateways. Using any of these payment gateways is as easy as creating an account with the gateway and entering your payment gateway Customer ID for the relevant country into this system (**eCommerce -> Payment Gateways**).

Keep in mind there are costs associated with having a Payment Gateway account which are negotiated directly between you and the gateway. With most payment gateways you will also require a merchant account from your bank. Another complexity that needs consideration is whether you intend to accept payments in more than one currency. In this scenario you need to ensure your payment gateway and/or your bank allows for the different currencies.

Most payment gateways are "seamless". That means customers pay for goods on the merchant's website without being redirected to a 3rd party website. Seamless payment gateways are currently available in USA, UK, Australia, New Zealand, South Africa, Malaysia, Singapore and a number of other countries. Payment gateways for other countries are added from time to time. In our experience seamless payment gateways have a higher conversion rate.

Below is a summary of the various payment types supported by this system. You can choose to use one or more of them on your website.

Real-Time Credit Card Processing

If you have subscribed to a supported real-time payment gateway then you can allow your customers to pay for their purchases using their credit card. Transactions are processed in real-time on your website (i.e. at no time does the customer leave your website when making the payment). You can see a complete list of supported payment gateways via the Administration interface in **eCommerce -> Payment Gateways**.

Offline Processing

Offline processing is a quasi-payment gateway useful for those retailers that have an existing point-of-sale (POS) or credit card facility and do not wish to subscribe to a payment gateway. This payment gateway will capture credit cards details from customers during the checkout process. There is no validation around the credit card details entered. The system will indicate a successful transaction to the customer. The payment and credit card details are captured for the order with a "pending" status payment.

You can then use your existing offline credit card facility to process the payment before marking the payment as "success" and shipping the goods

If you are selling e-products, the system will not allow products to be downloaded until an order is paid in full and the payment status is set to "success".

Credit card details for an order can only be retrieved using the secure URL assigned to your website. To find out what the secure URL is for your website go to: Admin -> Manage Domain Name and view the list of URLs toward the bottom of the page.

To see a list of orders go to the Customer section and click on Orders. You can choose any order to see its details. When viewing an individual order you can click on the “CC Details” to view the credit card details entered.

Cash on Delivery

This payment option works similarly to the “Offline Processing” method, except that it will not ask for credit card details. The order will be created with a payment which has a “pending” status. It’s important that you include your banking details as part of the email invoice that is sent to customers who purchase online.

PayPal

PayPal is another form of a payment gateway where retailers do not require a merchant account from their banks to accept payments online. This service, operated by eBay, is widely used and is extremely cost effective. However this type of payment gateway, referred to as a non-seamless gateway, redirects customers to the PayPal website to process the payment, before redirecting the customer back to the merchant’s website.

As noted in one of the earlier topics this type of gateway can adversely affect sales due to the fact it redirects customers off the merchant site to process payments.

Payment Gateways when selling to a global audience

Generally if you wish to process payments in real-time on your website, you would establish an account with a supported payment gateway. The limitation with most real-time payment gateways is that they will only process payments in one currency (note that PayPal is not a real-time payment gateway. However it can process payments in more than one currency).

However in some circumstances it may make sense for you to establish an account with more than one payment gateway. In this system for example you can use one payment gateway for your American customers where they are charged in USD$ and use a different payment gateway for your Australian customers who will be charged in AUD$.

To configure a different payment gateway for each country go to eCommerce -> Payment Gateways. Choose any country and select the relevant payment gateway. Click Save to complete.

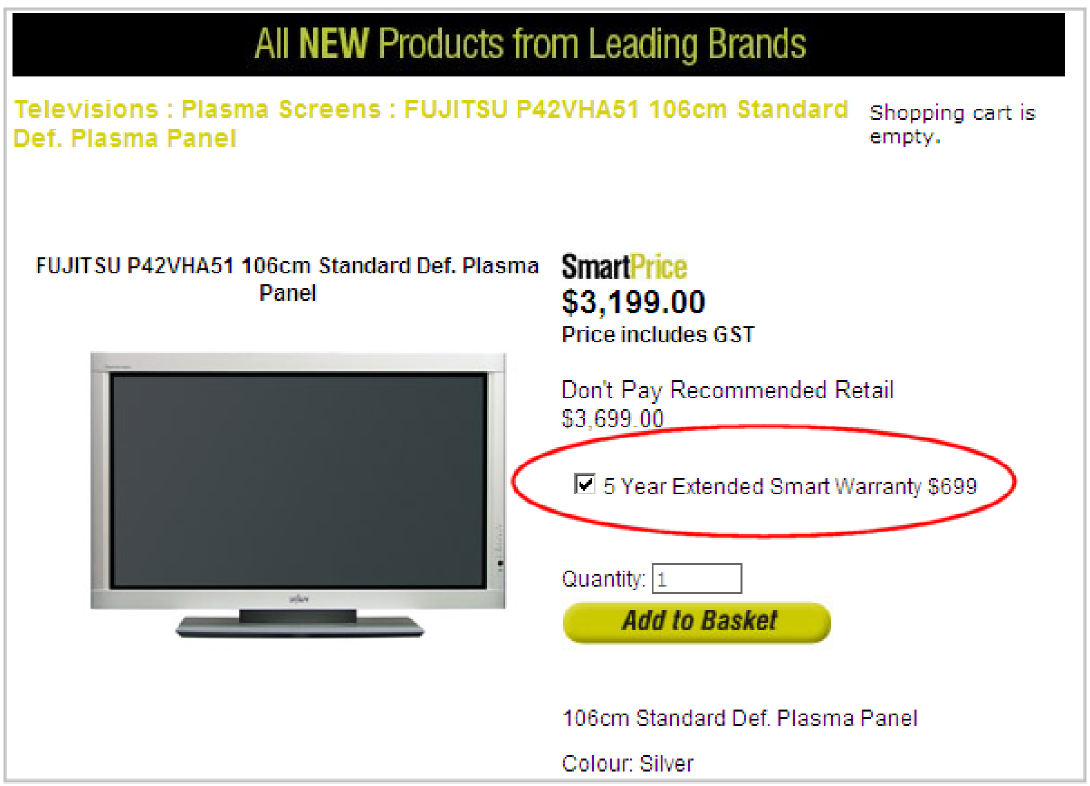
10.16. Related Products, Cross-Selling and Up-selling

This e-commerce system allows for effective cross and up-selling of products. Imagine a customer purchasing a Cell Phone. You can significantly increase sales if at the time of adding the Cell Phone to the shopping cart, the customer was invited to also add a Hands Free Kit or a Car Charger or both. The “Related Products” feature of the system allows you to easily link products to each other in order to up sell and cross sell as one is added to the cart.

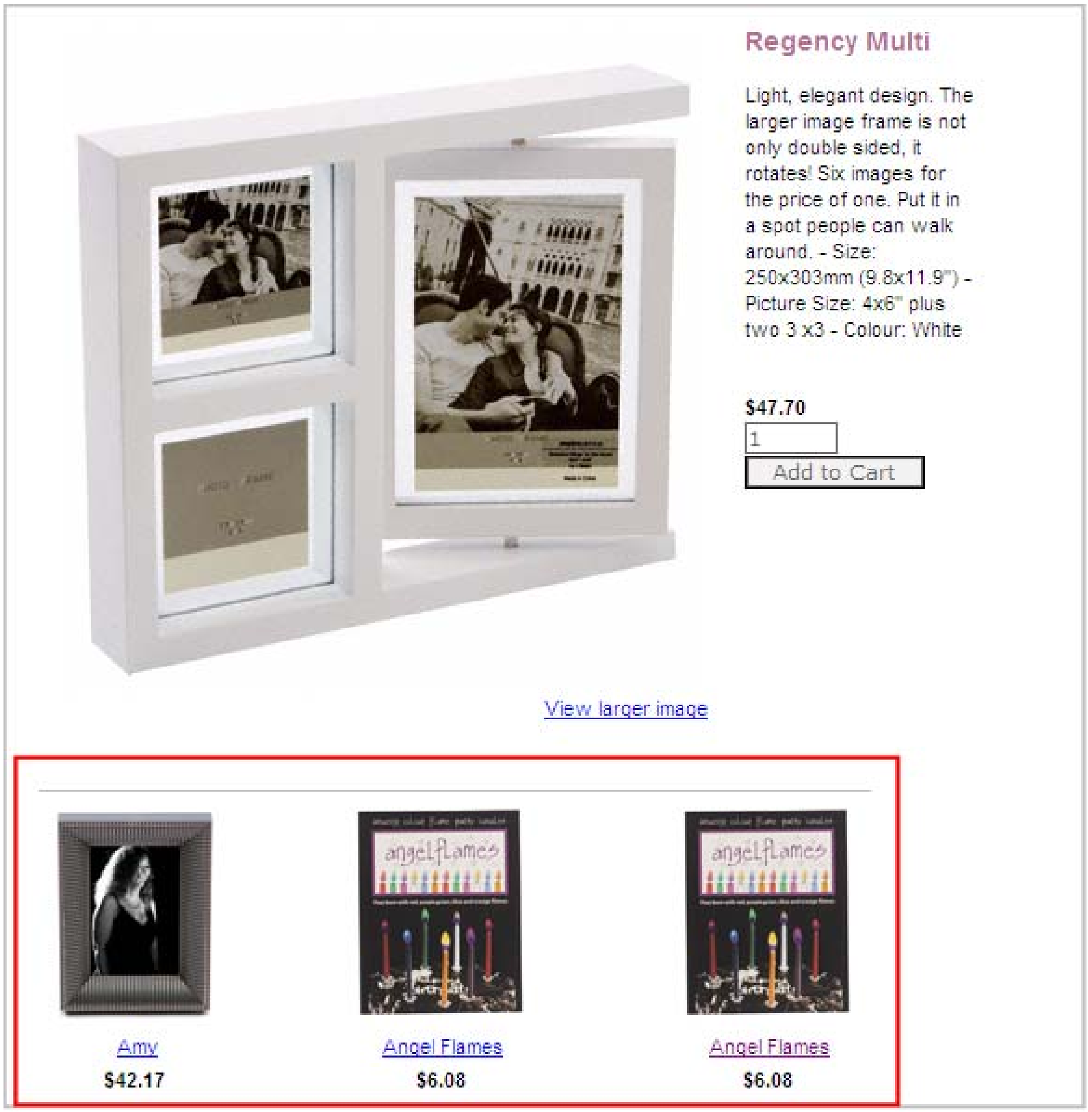
The related list may only be displayed on the “Large Product Template”. If you require customers to see the related list before adding a product to the list then you may remove the “Add to Cart” and “Buy Now” options from the “Small Product Template” so customers are forced to click on a product and see its details. And hence see all the related products.

Below is an active example of related products where Warranty is being recommended to the customer at the time when they add a Plasma TV to their shopping cart.

Use {tag_relatedproductslist} to display checkboxes. Alternatively use {tag_relatedproductslist,7} to display radio fields instead.



Below is a more passive example of related products where these are displayed separately on the "Large Product Template". To display related products in this format use {tag_relatedproducts}. To only display the product image without any text use {tag_relatedproductslist,8}



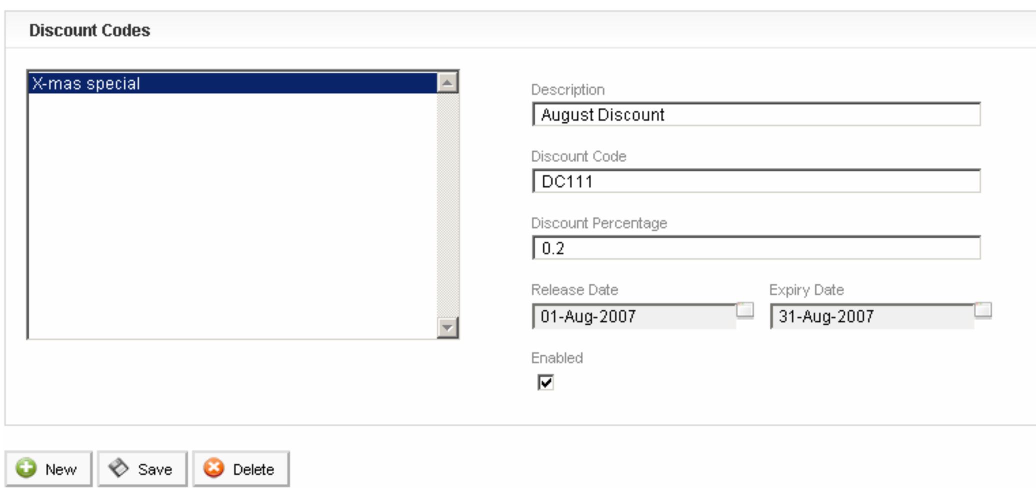
10.17. Discount Codes

Discount codes are a great way to increase your online sales. You can create as many discount codes and distribute them amongst your various customers groups or distribute them to new customers inside your marketing campaigns.

Discount codes allow customers to get a percentage off the total of the goods being purchased. Please note that shipping charges are not discounted.

Every discount code has a name; this is what the customer enters to receive their discount. All discount code names begin with DC. E.g. You can create a discount code for your loyal customers around Christmas and called it DC-Christmas with a 10% discount. This means customers who enter this code are entitled to a 10% discount off the total price of their order. You can use the built-in email marketing feature to distribute this discount code to any segment of your customer database.

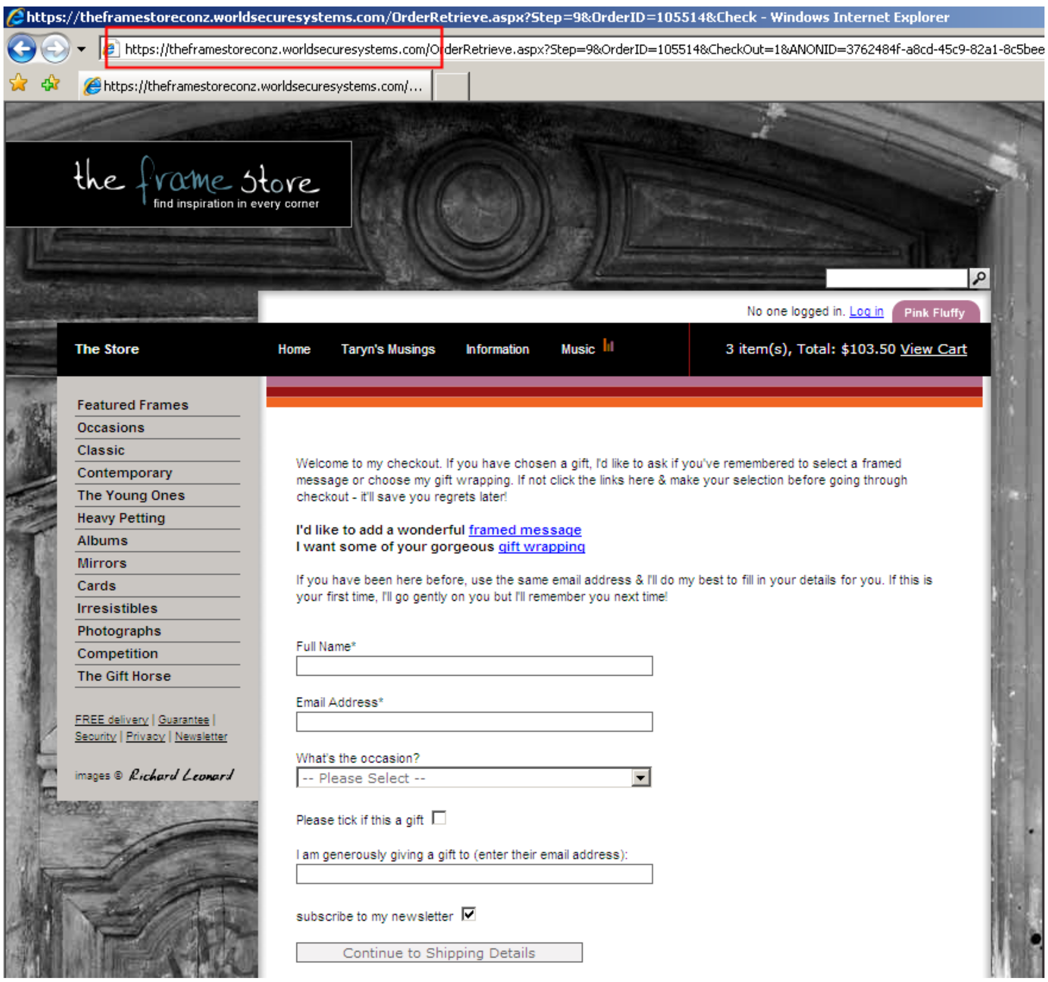
Discount codes have a release and expiry date. This means the code can only be redeemed during the specified date range. There is no limit as to how many times a discount code can be used. You can at anytime disable the code by disabling it or deleting it.



10.18. SSL Security Certificate

Your online shop comes with and is already configured to take advantage of the latest security technologies to protect your customer's transactions. When going live with your online shop, you don't need to worry about your SSL certificate. You're your customers purchase from you, the system will utilize the secure URL that comes with every site to ensure credit card details and other sensitive information is protected using Secure Socket Layers technology.

Every site comes with a secure URL in the form of https://sitename.worldsecuresystems.com. To see the secure URL for your site go to Admin -> Manage Domain Name and view the list of site URLs at the bottom of the page.



10.19. Advanced Topics and Techniques

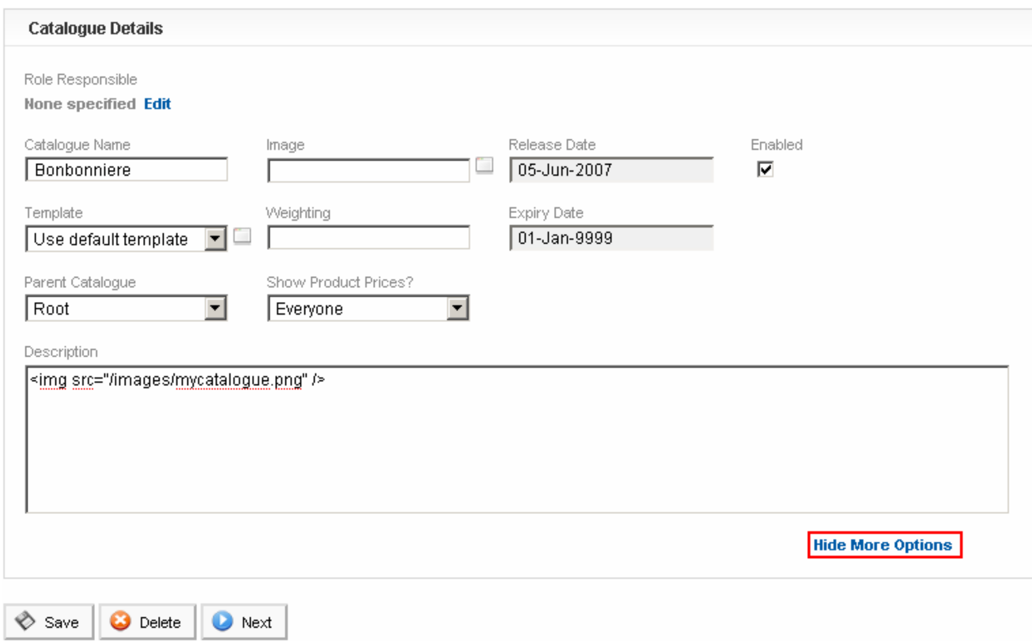
Customizing catalogues

There are times where you want to personalize catalogues even further by displaying a catalogue image, catalogue related information or just an image for the catalogue name.

To do this go to any catalogue and click on **Show Advanced Options** link (shown in red below) and enter your catalogue related information (including any HTML) in the catalogue **Description** field.

For example to display a different catalogue header image simply enter:

Ensure you have added the **{tag_description}** to the **Main Catalogue Template** (Admin -> More Customization Options -> Online Shop Templates).



Using Catalogue Name in URLs (SEO Friendly)

Prior to August 2007 all catalogues URLs in the system are in the format of: http://www.yourdomain.com/CatalogueRetrieve.aspx?CatalogueID=XYZ. Although the URL for every catalogue is permanent and does not change, you can choose to use a different format for your catalogue URLs to ensure a higher level of SEO friendliness.

When creating links to your catalogues from any web page or your navigational menus you can use the following format:

http://www.yourdomain.com/_catalogue_catalogueID/CatalogueName

So if your catalogue is called **Dishwashers** then your URL would be:

http://www.yourdomain.com/_catalogue_catalogueID/DishWashers

Note: **All catalogues created after August 2007 will automatically use a friendly URLs**

11. ONLINE COMMUNITIES

11.1. Secure Zones

Introduction

Secure Zones allow you to designate one or more areas of your public web site as secure. Accessing the Secure Zone requires customers to enter their username and password. If this is not entered they will be denied access to the Secure Zone. You can set up as many Secure Zones as you need to. Secure Zones can be established to provide customized content for different types of users.

So, why would you want to create a Secure Zone? Many web sites provide secure areas that allow different customers to access and view secure content. In the past this has been both expensive and hard to implement. Now you can establish and manage secure areas for your own web site with relative ease.

Secure Zones allow you to designate various items and areas other than basic web pages as secure. In fact, any content in the system can be made secure – Literature, FAQs, Announcements, Forums, Blogs and so forth.

By assigning an item to a Secure Zone, you are indicating that only customers who have access to that Secure Zone should be able to access it.

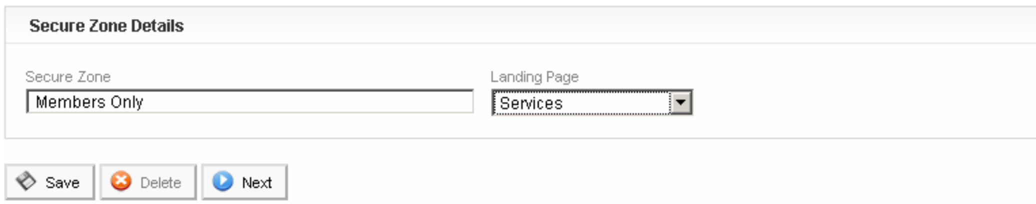
Secure Zone List

View a list of your secure zones under **Website -> Secure Zones.** The Secure Zone list displays a list of Secure Zones that have been created for your online business. Select a Secure Zone to view its details or select **Create a new Secure Zone** to create a new Secure Zone.

Setting up a new Secure Zone

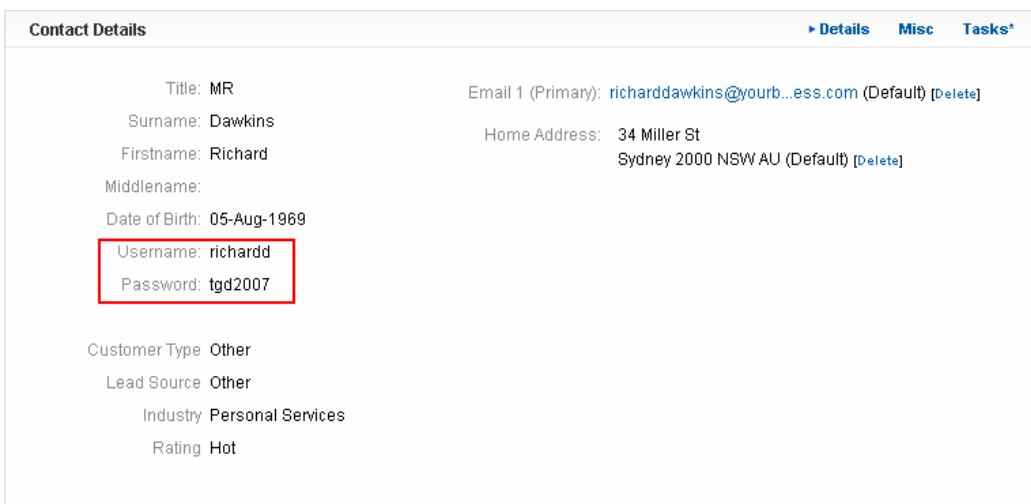
To create a new Secure Zone:

1. Select **Create a new Secure Zone**.
2. Enter a **Name** for the Secure Zone.
3. Select a web page to use as the **landing page**. The landing page is the page that the customer will be directed to after logging in.

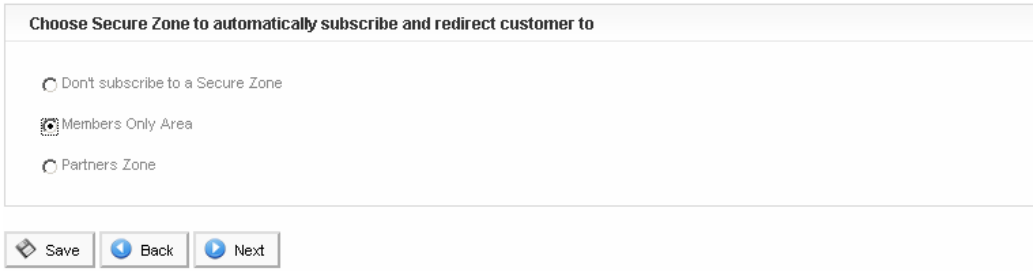


Managing Secure Zone Subscribers

Customers can be added to a secure zone by subscribing them to it. Choose a customer and retrieve their **Customer Record.** Select the **Manage customer subscriptions** link from Action Box. Here you can grant them access to any of your Secure Zones, and email them their username and password. Before doing this however, you must set up their username and password in the customer details section.

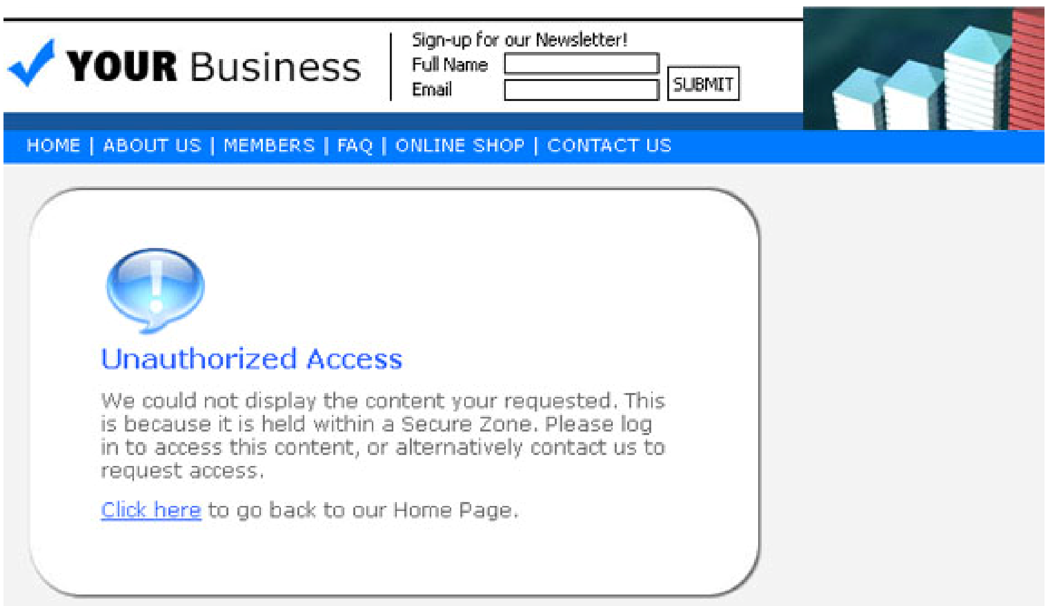


Alternatively, customers can be added to a Secure Zone by filling in a web form. To create a form that does this, go to **Modules -> Web Forms -> select the form -> Add system fields to Web Form** and then you can select a **Secure Zone** that the customer should be given access to upon submission of the form. You may optionally want to allow them to provide a **Username** and **Password**. After submission of this web form, they will be redirected to the secure zone's landing page.



<u>Secure Zones & Content</u>

You can add any content from your website to the Secure Zone. When content is placed in a Secure Zone it cannot be viewed by a customer browsing your website.

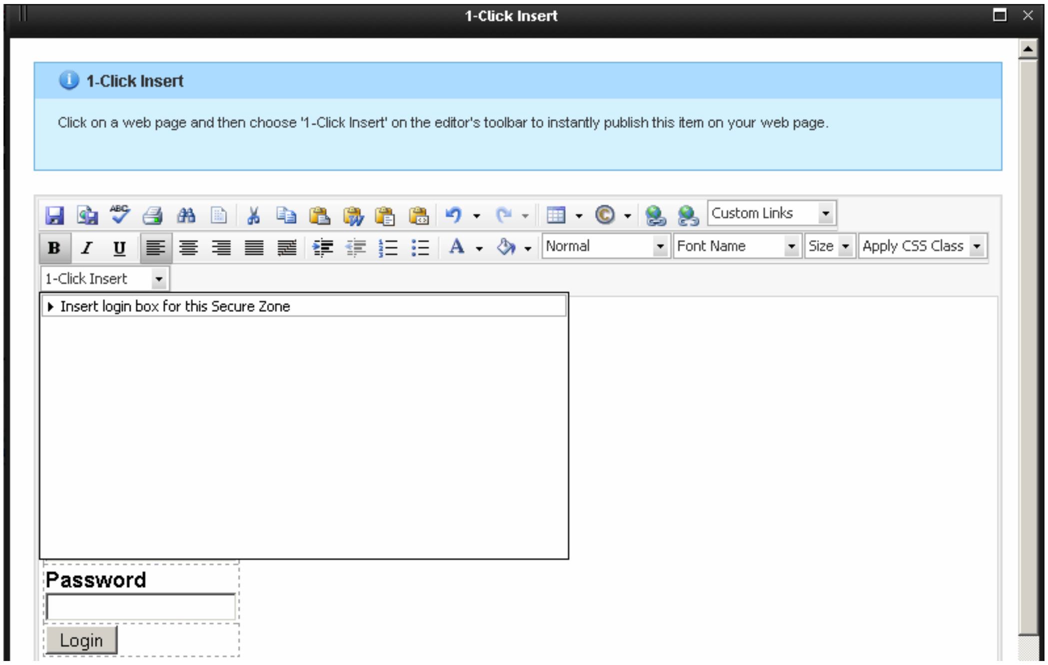


You can add items to the secure zone by moving them from left to right. You can also add an item to a secure zone when editing the item itself, via the **Secure Zone** menu item.

Note: A common mistake when making items such as Announcement and FAQs secure is to make the web page that this item appears on secure only. This does not make the item secure. To ensure total security the Announcement or the FAQ item must be made secure.

Logging in to Secure Zones

To allow a customer to log in to a Secure Zone, you must add a Secure Zone login box to a webpage or template. To do so **when creating the Secure Zone**, click on the **Add login box to a web page** link in the Action Box and select the web page you want to insert the login box on. Click the **1-Click Insert** dropdown menu to insert the log in box as in the picture below.



Alternatively you can use the Module Manager when editing a web page or template. You can find the Secure Zone login box under the Secure Zones heading in the module manager.

HTML Code

If you want to place this Secure Zone on a website hosted elsewhere then you may copy and paste the HTML code provided in under the **HTML Code** tab. This approach is useful if you want to host your secure content with Your Online Business and the remainder of the website on a 3rd party hosting environment.

If you are using Your Online Business to host the entire website then use Add to web page link in the Action Box or Triangle to easily add a Secure Zone login box to any web page.

Publishing Case History for Customers in Secure Zones

As secure zones are accessed by the customers you specify from within your customer database, you are able to publish much of the information relating to a customer in those secure zones. This allows customers to access information relating to them easily and securely. For example you can publish all cases for a given customer in a secure zone so that customer can view these, download any related files, and view the message threads.

To learn more review the earlier topic on Cases and Case Management.

Who's Logged in Module

The who's logged-in module displays the name of the current customer that is logged in to a secure zone on your website. When a customer is logged in this module displays:

John Citizen Logged in. Log Out.

Otherwise it appears as:

No one logged in. Log in.

To use the module add it to any web page

{ module_whosloggedin }

To include a link to your login web page that allows customers to login, insert:

{ module_whosloggedin, /Login.htm }

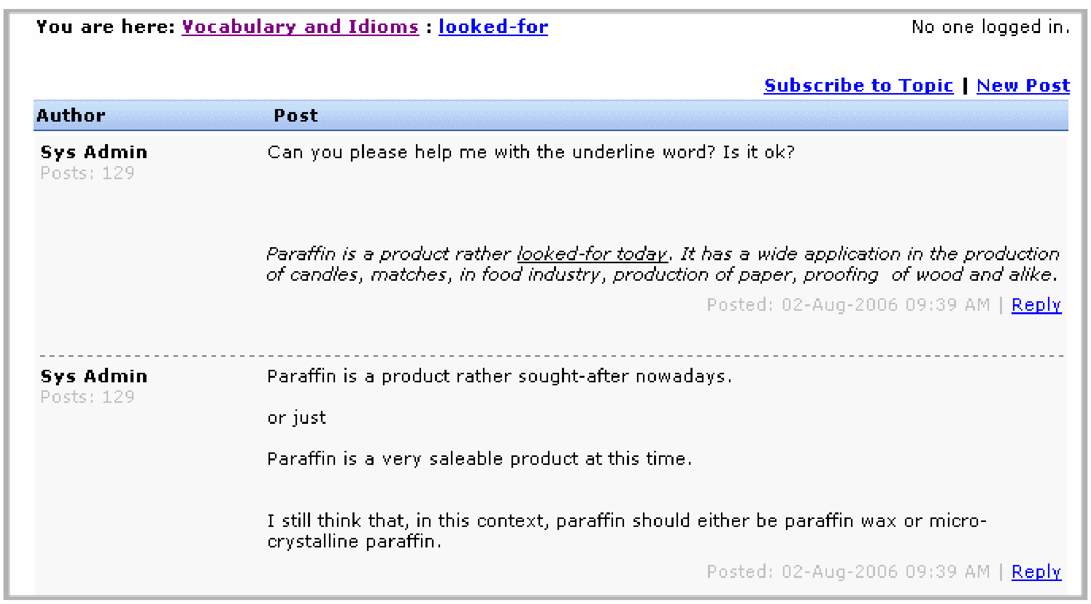
11.2. Forums

Introduction

Forums are a powerful facility for enabling the exchange of ideas, thoughts and comments between you and your customers or simply between your customers. Forums make your website livelier, and add credibility due to the transparent nature of forums. More importantly forums encourage your customers to come back to your website over and over again. By implementing a forum on your website you can begin the process of building a loyal and active customer base.

Key aspects of the forums feature are:

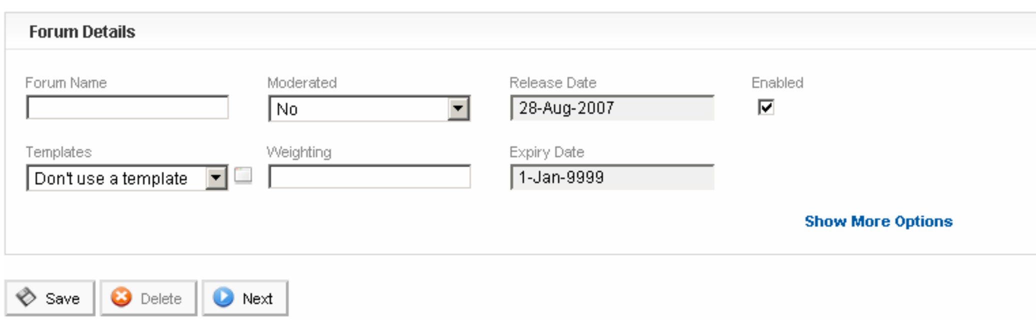
- Unlimited forums and posts
- Ability to moderate forum entries
- Public or private forums
- Fully customizable forum appearance
- Forum subscription and alerts
- Classify forums and make it easy to publish forums on your website
- HTML or Text based forums
- Ajax technology for a superior user experience
- And much more!



Setting up Forums

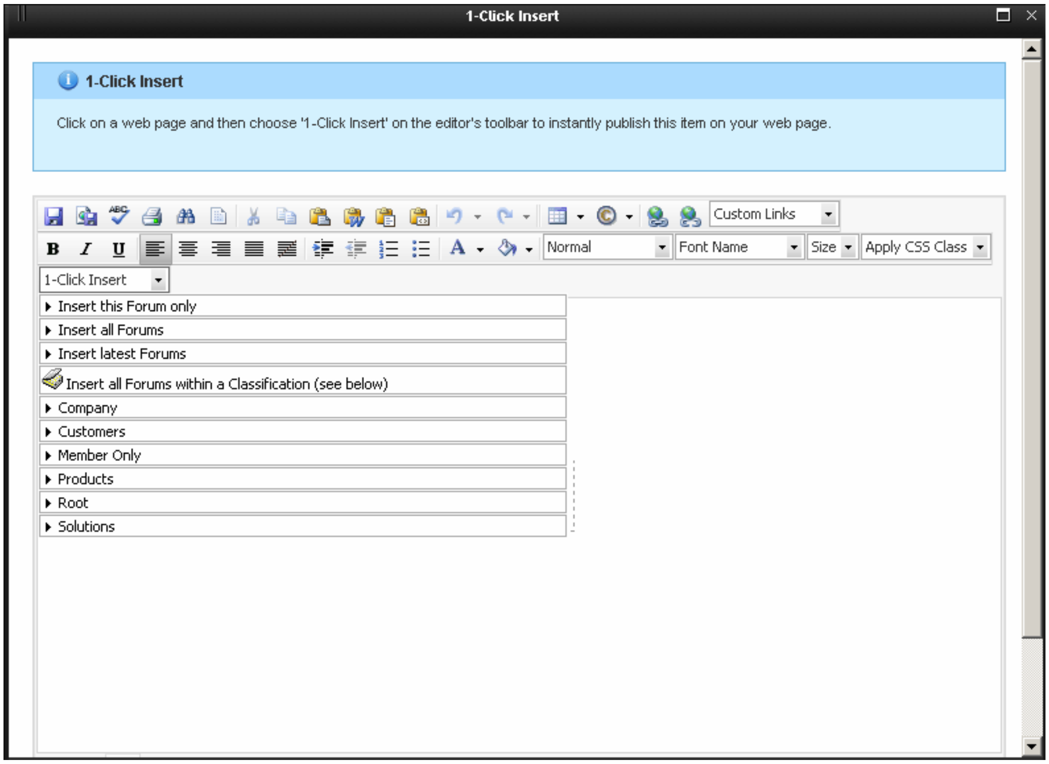
Creating a forum and placing it on your website will take no more than a couple of minutes. To get started and create your first forum and publish it on your website go to **Website -> Forums**.

1. Click **Create a New Forum**
2. Enter a **name** for your forum
3. Choose the level of **moderation** you wish to have for your forum.
    a. If you choose **No** for moderation, then **anyone** can register and post to your forum. These posts can be read by all others as soon as they are made.
    b. If you enable **full moderation** then all **posts must be verified** and approved by you before they become accessible to your website visitors.
    c. A third level of moderation is to moderate **for first time user posts** only. This means, any user who has **not previously made a post** to any of your forums will need to **have their post approved** by you first. If a user has made one or more posts that have been previously approved, then **future posts are instantly published** and made accessible on your website.
4. You can optionally control when your forum becomes accessible on your website and when they are removed. To configure this set a forum's **release** and **expiry dates**.
5. If you are using the full solution you can choose the **template** that is used when your forum is being viewed by your website visitors. When you choose a template you ensure your corporate identity is carried through in all parts of your website.
6. **Save** to finish



That's all it takes to create a forum. Now you are ready to publish it so your customers can see your new forum on your website. To do so:

1. Click on the **Add Forum to a web page** link in the Action Box
2. Choose the **web page** you wish to add the forum to
3. Choose the 1**-Click Insert drop down** option from the editor's toolbar as shown in the image below
4. Choose **Insert this Forum Only**
5. **Save and Publish** to complete your changes
6. **Preview** your web page in your web browser to see your forum



<u>Topics and Posts</u>

Forums are a holding area for a related series of discussions, i.e. topics and posts. **A forum has many topics and those topics in turn have many posts**.

Forums are only ever created by you, however once you publish your forum on your website, you are effectively inviting your customer base to participate and post their own topics within the forum. This in turn encourages others to participate by responding to those topics, referred to as "posts" or enter new topics of interest.

You should control the number of forums on your website. It's better to have fewer forums but have a higher level of participation within those, e.g. have many topics and posts within the forums. It's good practice to ensure a high level of participation by you within the forums. This will demonstrate an active forum and is a catalyst to getting others participating.

If you have enabled **any level of moderation** for your forum, then you will need to visit the **Topics tab** in the Administration area for your forums and **approve or disapprove new topics and posts**. Under this tab you can **see a list of topics and their posts.** You may also view all unapproved posts and select and approve them accordingly.

Please keep in mind that if moderation is enabled, then you must approve all new topics and posts. If a topic is not approved then any approved posts within the topics will not be made available on your website until the topic is also approved.

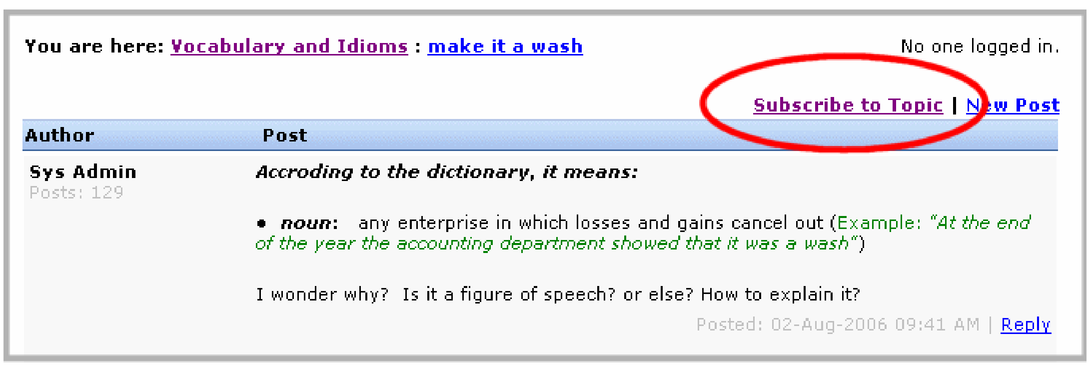
Forums Registration

Customers who wish to participate in your forums and create new topics or reply to existing ones must first register. The system **does not allow anonymous posts** per se, however **each user may choose the alias** they would rather use when participating in forums. Users may choose an alias and a signature amongst other things during the registration process. For existing "registered" users, i.e. those who already exist in your customer database but have never participated in forums, their first name will be used for posts unless they enter an alias and other forum related information.

Users are automatically directed to the registration / login page of forums when they choose any link that requires them to be logged in. After logging in or registering, they will be redirected to the relevant page that they requested initially.

Subscribing and Alerts

Forum subscriptions and alerts are a fantastic way to keep customers engaged and participating in your forums. By default when a customer writes a new topic or posts to an existing one, they are invited to **Subscribe** to that topic. When a user subscribes to a topic it means they are interested in its activity in the future. They'd like to be notified when other people reply or comment on their posts. A user does not need to contribute to a topic to subscribe to it. If a user finds a topic interesting they can **click on the Subscribe to Topic** link to subscribe to it.



When a new post is made to a topic, **all subscribers of the topic are automatically notified** by the system. They are notified that a new entry has been posted and that they should revisit your website to view the content. Users can **unsubscribe from a forum subscription** in one of two ways.

- By viewing a topic that they are already subscribed to, they will instead see the following link Unsubscribe from Topic.
- Alternatively whenever a user receives a forum alert via email, it contains an unsubscribe link.

Classifying Forums

Classifying forums enables you to **publish groups of forums** with relative ease in your website. For example, if you have a number of Support related forums you should classify each forum in the Support classification. When you publish your forums on a web page you can choose to publish all forums within a Classification. By choosing the Support classification the system will automatically display all forums within this classification on your web page. If in the future you create a new forum and also classify it in the Support classification, it will automatically appear on those web pages that have the other Support related forums.

In fact, most types of content can be classified. These include announcements, FAQs, literature and so on. This feature allows you to easily create a support area on your website and publish all support related forums, FAQs, announcements effortlessly in one central area.

Public vs. Private Forums (Secure Zones)

Forums may be added to one or more Secure Zones. By Adding a forum to a Secure Zone, you restrict access to it to members of the Secure Zone. Web Site Visitors will not be able to access the item via a link or any other method.
Secure Zones allow you to designate one or more areas of your public web site as Secure. Accessing the Secure Zone requires users to enter their username and password. If this is not entered they will be denied access to the Secure Zone.

You can set up as many Secure Zones as you need to and assign various types of content to those areas. You can also grant various customers within your website access to a secure area and choose when each customer's access to the secure zone expires.

Customizing Forum Appearance

Your forums are fully customized and are ready to be used on your website and should not require further customization. However should you wish to customize them, then you have full control to alter their look and feel. In fact the forum feature is extremely customizable where you can achieve any desired look and feel outcome.

There are a number of templates that you need to familiarize yourself with. You can find these in the Admin -> More Customization Options -> Forum Templates area. The templates include:

- Individual Forum template
- Individual Topic template
- Individual Post template

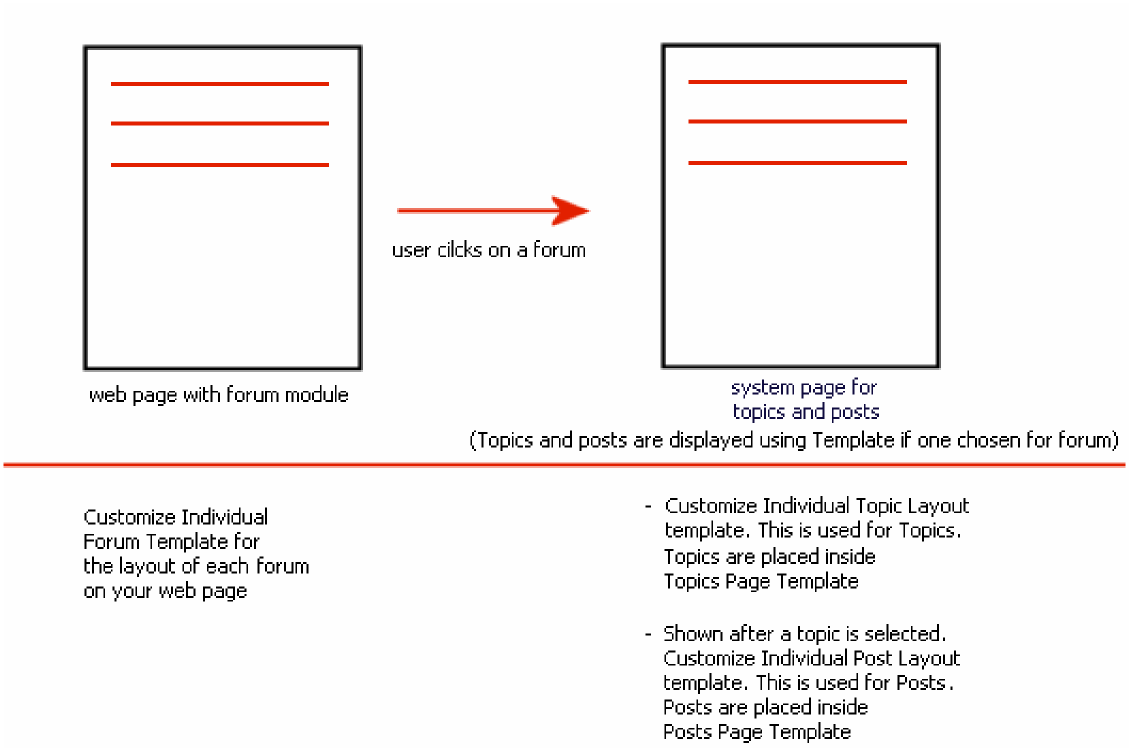
and

- Topic Page template
- Posts Page template

If you are familiar with customizing FAQs and Announcements then Forums follow a similar path. The things to remember when customizing forums:

- **The Individual forum template** is used to lay up an individual forum. This template defines where the forum name should be placed, where the last post author name and date should reside in relation to the name, the number of topics the forum has and so forth**. Forums always appear on one of your web pages**. That is you will need to add the forum module to a web page. If you tell the forum module to display a list of forums, then this template is used for each forum as it is rendered out on the page. Refer to the Tag Insert option on the editor's toolbar for a list of available tags. To make your forums look even better, you may want to manually add a header table just above the forum module on your web page that enhances the output of the forums list.
- When a user selects a forum they are redirected to a system page that handles the display of topics and posts. Although this page is not one of your web pages, it is still entirely customizable.
- A forum consists of many topics and the list of topics is displayed after a forum has been selected. This page contains up to 3 elements.
    - The first is the Individual Topic template which similarly to the Individual Forum template defines how an individual topic is displayed. When a list of topics is displayed, then **this template is used as many times as there are topics**.
    - Once the **list of topics** has been rendered out, they are **placed inside the Topic Page template** (refer to {tag_topiclist}). This is the holding page that contains the list of topics, and many other available tags that related to the viewing of topics.
    - If you have chosen an overall template for your forum, the **Topic Page template** is then **placed inside the overall template** to ensure your corporate identity is carried through in forums.
- When a user selects a topic to view its posts, a similar set of rules are followed to display the posts within the topic.
    - First the **Individual Posts template** is used to render out the posts.
    - These are then placed inside the **Posts Page template** (refer to tag_postlist)
    - If you are using **an overall template**, the entire thing is placed inside it before being shown to the user.

By looking at the template layouts in the Customize section you will quickly understand how they work and should be able to change the appearance of these templates with relative ease.



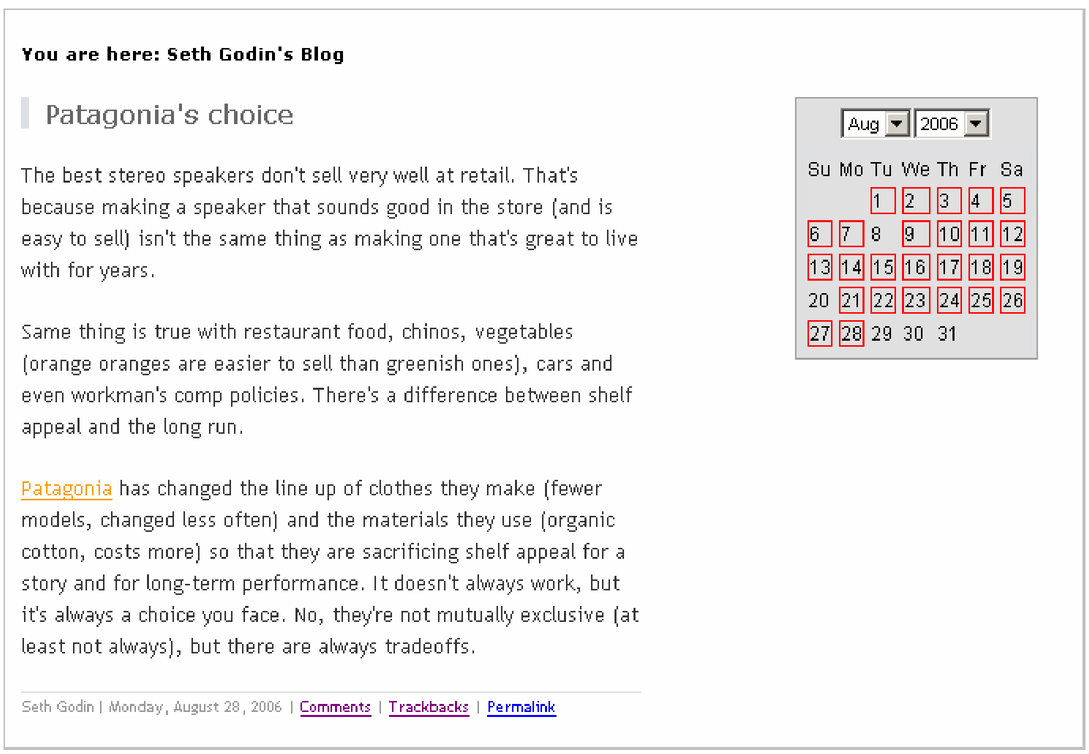
11.3. Blogs

Introduction

Blogs or Weblogs, are a powerful way to communicate with your customers in a more personal, one-on-one fashion. They give you a space to express your thoughts and ruminate on current events. You can announce a new product or teach the world your philosophy. Many businesses are beginning to realize the power of Blogs in creating authentic and engaging discussions with existing and potential customers. Adding a blog to your website is a great way to develop and grow your relationships with your customers online.

Here's some of the key features of blogs:

- Unlimited posts
- Ability to moderate comments
- Fully customizable Blog appearance
- Automatic RSS Feed creation
- Public or Private blogs
- Ability to set the release date of posts in the future
- Receive and send Trackback pings to other blogs
- And more!



You are here: Seth Godin's Blog

Patagonia's choice

The best stereo speakers don't sell very well at retail. That's because making a speaker that sounds good in the store (and is easy to sell) isn't the same thing as making one that's great to live with for years.

Same thing is true with restaurant food, chinos, vegetables (orange oranges are easier to sell than greenish ones), cars and even workman's comp policies. There's a difference between shelf appeal and the long run.

Patagonia has changed the line up of clothes they make (fewer models, changed less often) and the materials they use (organic cotton, costs more) so that they are sacrificing shelf appeal for a story and for long-term performance. It doesn't always work, but it's always a choice you face. No, they're not mutually exclusive (at least not always), but there are always tradeoffs.

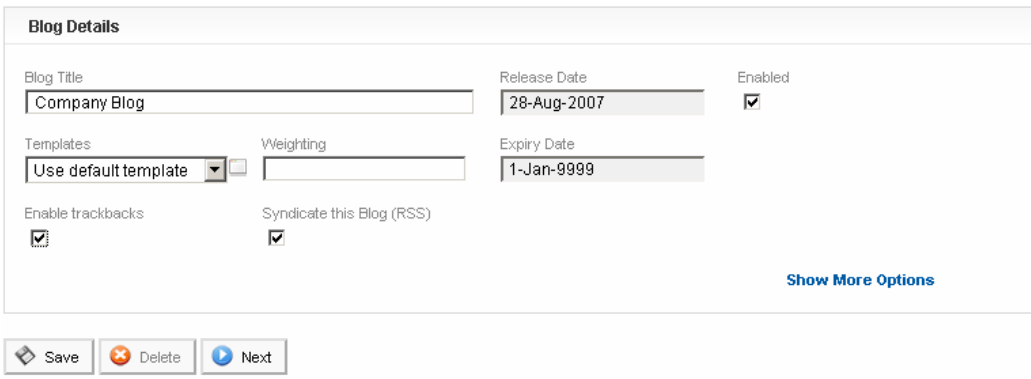
Seth Godin | Monday, August 28, 2006 | Comments | Trackbacks | Permalink

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Setting Up Blogs

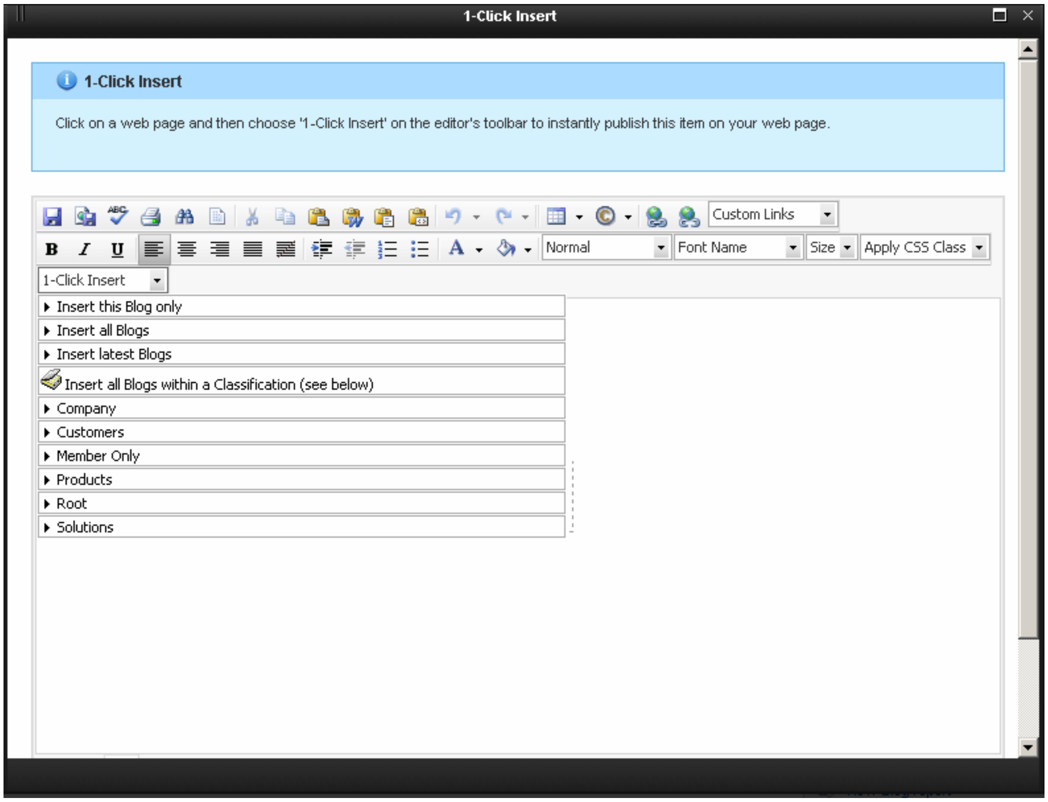
Setting up a new Blog is quick and easy. First go to Website -> Blogs.

1. Click **Create a New Blog**
2. Now you can fill in all the details for your blog. Hold the mouse cursor over each field to see a description of the field and how to fill it in.
3. Write a description for your blog that will appear on your blog's page (to see description field click on the **Show Advanced Options** link in the bottom-right corner). It should be descriptive of what you blog is about and what you might talk about.
4. Click **Save** and you're done!



Now you can write a post, or make you blog secure, or classify it (see below topics). Now, to add your blog to a page - it's simple.

1. Click on **Add Blog to a web page** link in the Action Box
2. Choose the **web page** you wish to add the blog to
3. Choose the **1-Click Insert drop down** option from the editor's toolbar as shown in the image below
4. Choose **Insert this Blog Only**
5. **Save and Publish** to complete your changes
6. Preview your web page in your web browser to see your (currently empty) Blog



Posting to your Blog

A post is an entry on your blog. Posting to your blog is simple. After creating your blog in Website -> Blogs, click on the "Blog Posts" link. To create a new post:

1. Click the **New Post** button
2. Give your post an engaging title
3. Pick a **release date**. The default is today, but you can set the date into the future if you want to schedule you post to go out later.
4. If you got inspiration from another blogger, copy the "TrackBack" url for their post and put them in **Trackback URLs**, one per line (click on the "Show Advanced Options" link to see this field). Remember you should have a link inside your post to the blog you are trackbacking to, to show you are genuine and not spamming the other blogger!
5. Write the body text of your post.
6. Click **Save** and you're done! You'll see if the TrackBacks you've entered have succeeded or not.

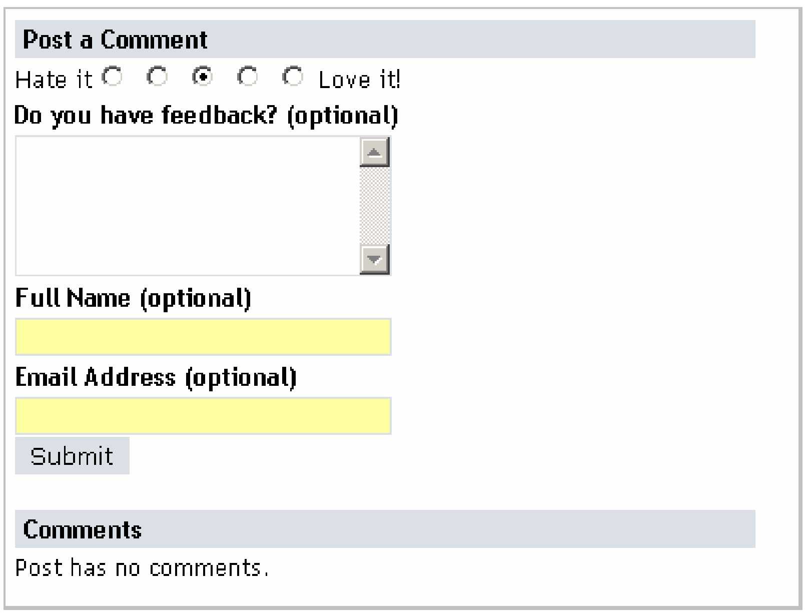
At any time you can come back and click on the title of the post to load that post and edit/delete it.

Interacting with your readers: Trackbacks and Comments

Trackbacks are a mechanism to automatically create a relationship between your post and another bloggers post via links. To complete a Trackback we need to "ping" the Trackback address or URL. The Trackback contains all the necessary information to the other Blog so that a link appears on the other blog, back to your blog. It's a great way to have a conversation with other bloggers.

You can allow Trackbacks by checking the checkbox in the "Details" tab.

Comments allow your Blog readers to leave a comment about a post. This feature uses the **Comments module** on your blog posts. All comments need to be approved first before being displayed on your website. To read and moderate comments go to **Modules -> Comments**. Also to learn more about Comments please refer to the Comments topic.



Blogs and RSS

RSS is way to **syndicate your content** to other sources. People use RSS feeds to be notified of changes to your blog without visiting your blog directly. Several types of content are RSS-able, but Blogs and RSS in particular go hand in hand.

As such, you can set it up so that your Blog has **its own RSS feed** and that **every post is automatically added** to it. In the **Details** tab, simply check the check box **Syndicate this blog (RSS)**. When you select this option an RSS Channel will automatically be created using the same name as your blog, and then every time you post, your posts will be added to it.

Classifying Blogs

Some companies have several blogs about different things. Using classification, you can classify a blog primarily about product support under "Support", or a blog about marketing under "Marketing". To classify your blog, simply click on the **Classifications** tab and select the classifications that apply to your blog.

When you publish your blog on a web page you can choose to publish all blogs within a Classification. By choosing the Support classification the system will automatically display all blogs within this classification on your web page. If in the future you create a new blog and also classify it in the Support classification, it will automatically appear on those web pages that have the other Support related blogs.

Most types of content can be classified. These include announcements, FAQs, literature and so on. This feature allows you to easily create a support area on your website and publish all support related Blogs, FAQs, announcements effortlessly in one central area.

Public v.s. Private Blogs (Secure Zones)

Do you want to keep your blog about upcoming products private to your registered customers? You can do this by clicking on the **Secure Zones** tab. By Adding a blog to a Secure Zone, you restrict access to it to members of the Secure Zone. Web Site Visitors will not be able to access the item via a link or any other method.

Secure Zones allow you to designate one or more areas of your public web site as Secure. Accessing the Secure Zone requires users to enter their username and password. If this is not entered they will be denied access to the Secure Zone. You can set up as many Secure Zones as you need to and assign various types of content to those areas. You can also grant various customers within your website access to a secure area and choose when each customer's access to the secure zone expires.

Customizing Blog Appearance

Your blogs are fully customized and are ready to be used on your website and should not require further customization. However should you wish to customize them, then you have full control to alter their look and feel.

In fact the blogs feature is extremely customizable where you can achieve any desired look and feel outcome.

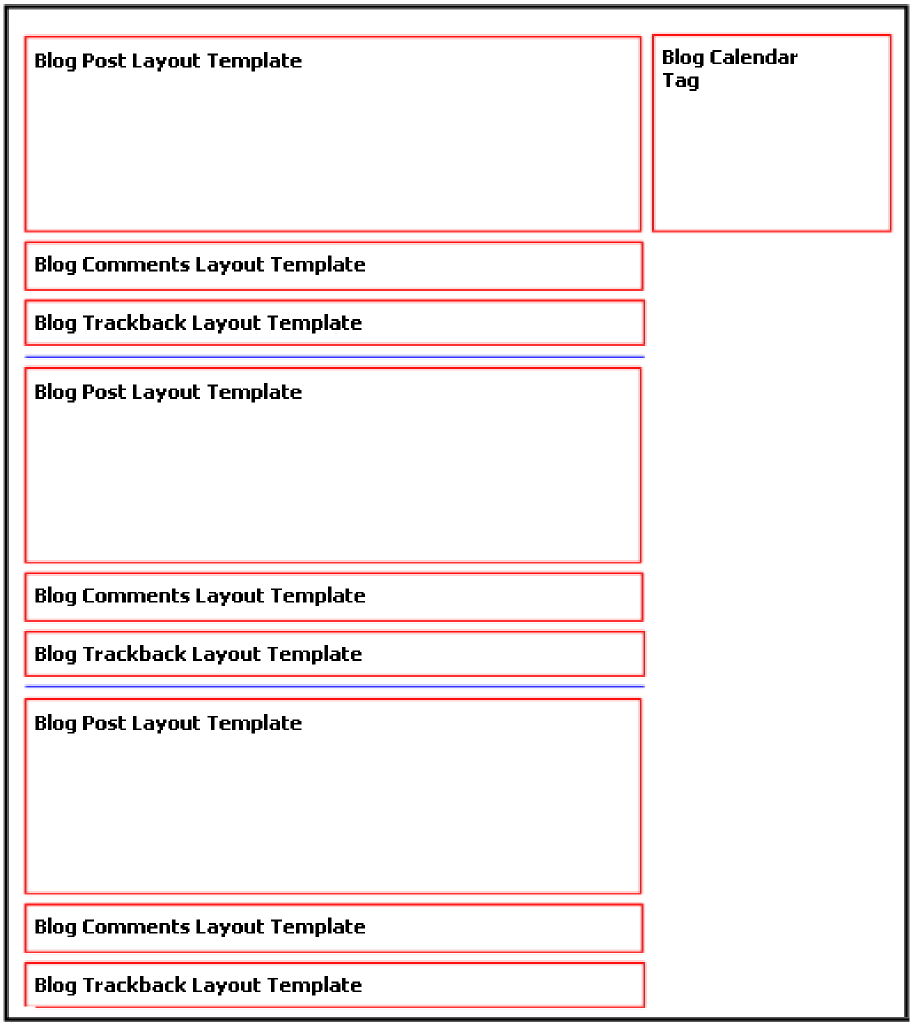
There are a number of templates that you need to familiarize yourself with. You can find these in the Admin -> More Customization Options -> Blogs Templates area. The templates include:

- Blog Layout
- Blog List Layout
- Blog Post Layout
- Blog Comment Layout
- Blog Trackback Layout

If you are familiar with customizing FAQs and Announcements then blogs follow a similar path. The things to remember when customizing blogs:

- **Blog List Layout** defines how a list of blogs would be displayed. The blog list might show the blog title, number of posts, the date of last post, and so on. Blogs always appear on one of your web pages. That means you will need to add the blog module to a web page. **If you tell the blog module to display a list of blogs, then this template is used for each blog as it is rendered out on the page**. Refer to the **Tag Insert** option on the editor's toolbar for a list of available tags. To make your blogs look even better, you may want to manually add a header table just above the blog module on your web page that enhances the output of the blogs list.
- When a user selects a blog they are redirected to a system page that handles the display of post. Although this page is not one of your web pages, it is still entirely customizable.
- **The Blog Layout** is the overall **template for your blog**. It usually has the blog calendar, a placeholder for your posts, the blog title and so on. If you have chosen an overall template for your blog, the **Blog Layout template is then placed inside the overall template** to ensure your corporate identity is carried through in blogs.
- **Blog Post Layout** sets out **how each individual post** will be displayed. This template shows how the post title should be displayed, where the post body and author goes, links for comments and trackbacks and so on. **Each post is rendered according to this template, then wrapped inside the Blog Layout template.**
- The **Blog Comment and Trackback Layouts** are used to render out individual comments and trackbacks. By default the tags that relate to these are placed in the Blog Post Layout. You can customize both of these templates to give you maximum customization power.

Blog Layout Template



11.4. RSS

Introduction

RSS stands for both Really Simple Syndication and Rich Site Summary, depending on who you talk to. However, the main thing about RSS is not what it stands for, but what it does, which is Content Syndication. You can use RSS to allow your readers to subscribe to your content. That means that when you add content, subscribers to your RSS feeds are alerted. Overall RSS is an extremely powerful way to keep in touch with your customers.

Here are some of the key features of RSS:

- Unlimited RSS Channels with unlimited items
- Control the length of your RSS feed
- Enable and disable your RSS feed
- Complete control over the items in your RSS feed
- Syndicate your Announcements, FAQs, Web Pages, Blogs, Literature and Industry Content items.
- Insert links to your RSS feed anywhere on your site
- Generate a HTML link you can append anywhere on the web, or on your Email Newsletters

RSS Feeds, Channels and Items

To understand RSS we need to understand some of the RSS related terms you'll come across.

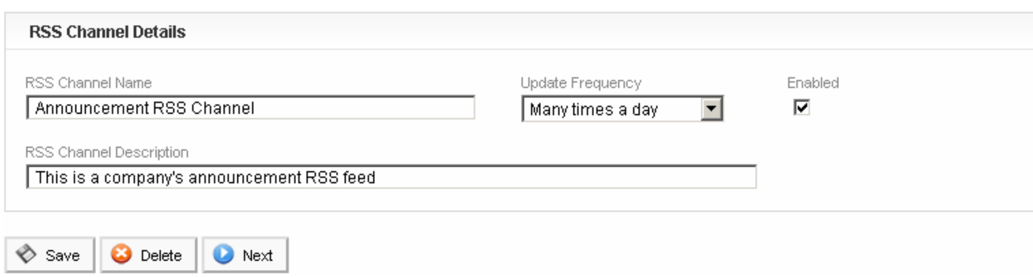
- An **RSS Feed** is what your readers subscribe to. It also refers to the physical XML file that represents the **RSS channel**.
- An **RSS Channel** is a collection of **RSS Items**. A Channel is usually a grouping of related items, such as blog posts.
- **In this system**, we generate an RSS Feed for each RSS Channel. So in the system an **RSS Feed equates to an RSS Channel**.

RSS is a standard format, but it has multiple versions. At present this system supports RSS versions 0.90, 0.92 and 2.0. We automatically generate feeds for every version, so generally speaking you don't need to worry about them. If in doubt, you should use the RSS 2.0 feed.

Setting Up an RSS Feed

Setting up a new RSS feed is quick and easy. First go to **Website -> RSS Channels**.

1. Click **Create a new RSS Channel**
2. Now you can fill in all the details for your RSS Channel. Hold the mouse cursor over each field to see a description of the field and how to fill it in.
3. **Update Frequency** should be set depending on how **often you will add items to it**. The RSS Channel only updates when you add new items to it.
4. Write a **description** for your RSS that will appear in the RSS Channel. It should describe the sort of items the Channel might contain.
5. Click **Save** and you're done.



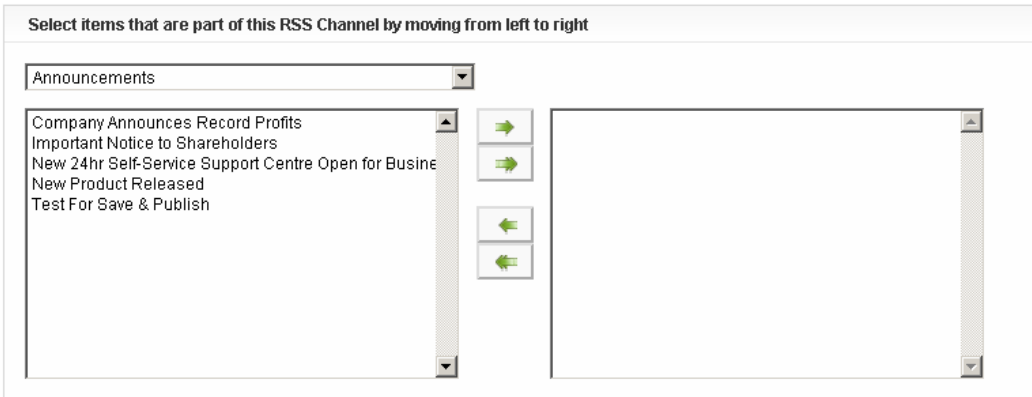
Now that you have a channel, let’s insert a link to it on a web page. Customers can use that link to subscribe to your RSS feed.

1. Click on the **Add RSS Channel to a web page** link in the Action Box
2. Choose the web page you wish to add the RSS Channel's link to
3. Choose the 1-Click Insert drop down option from the editor's toolbar as shown in the image below
4. Choose "Insert this RSS Channel Only"
5. Save and Publish to complete your changes
6. View your web page in your web browser to see the link, and subscribe to your RSS feed with your favourite RSS Reader!

Adding Items to the RSS Channel

Adding Items to the RSS Channel is simple. If you aren't there already, go to: Website -> RSS Channels -> Add items to RSS Channel.

1. First select the content type you want to add to the RSS Feed.
2. Once the type has been selected, you can add items of that type to the feed by moving the items from the left to the right hand box.
3. If you want to add everything or remove everything, simply use the ">>" and "<<" buttons respectively.



Allowing visitors to Subscribe to RSS Feeds

You can place a link to any of your RSS Feeds using the Module Manager.

HTML Code

Want to put a link to your RSS feed in your email newsletters or on an affiliate's web site? Easy! Just click on the "HTML Code" tab and copy the HTML code in the text box. You can then paste it where it is needed.

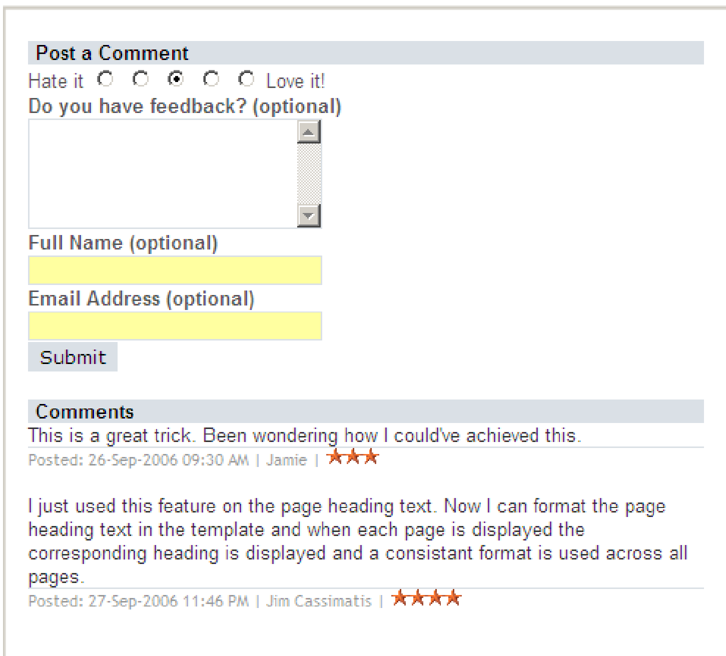
Blogs and RSS

RSS is way to syndicate your content to other sources. People use RSS feeds to be notified of changes to your blog without visiting your blog directly. Several types of content are RSS-able, but Blogs and RSS in particular go hand in hand. As such, you can set it up so that you Blog has it's own RSS feed and that every post is automatically added to it. In the "Details" tab, just check the check box "Syndicate this blog (RSS)". When you select this option an RSS Channel will automatically be created using the same name as your blog, and then every time you post, your posts will be added to it.

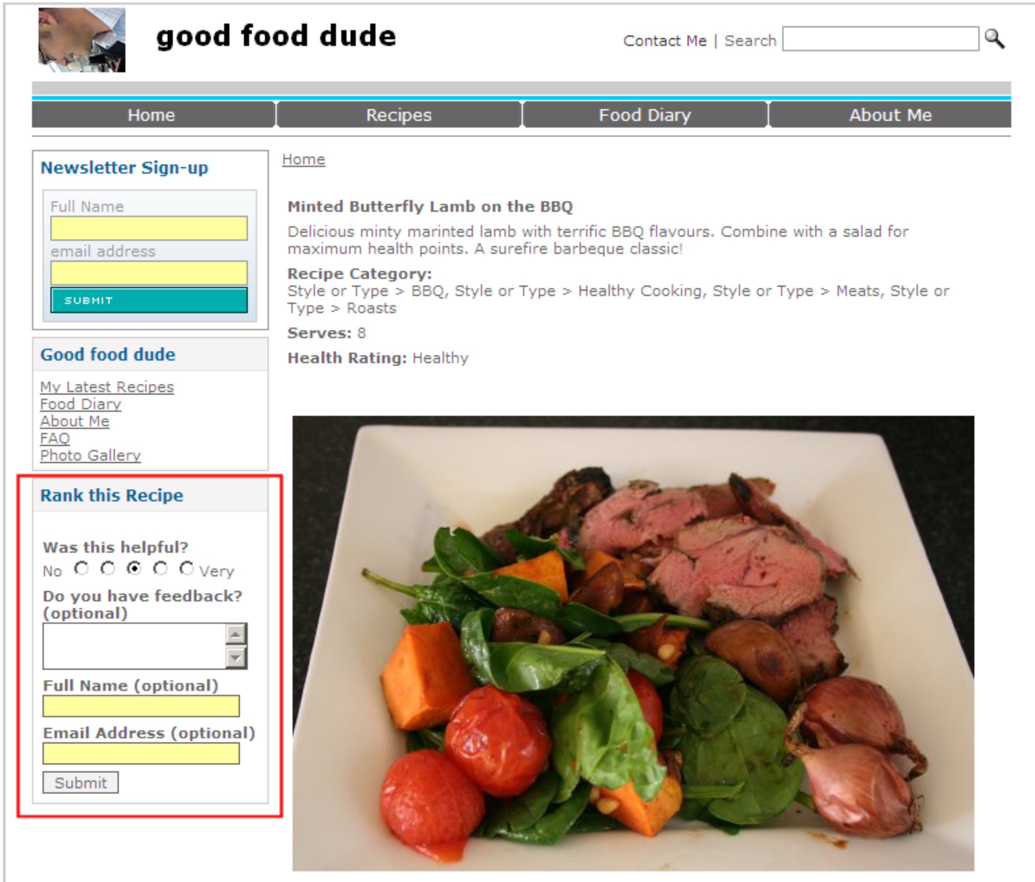
11.5. Comments

Comments enable you to create micro-communities around any type of content on your website. Comments encourage visitor participation on your website, creating an increased level of transparency and higher levels of credibility for your business. Comments also help towards creating a sense of community on your website.

It's likely that you've already seen similar Comments features implemented on most blogs. Accepting reader-input on one's blog entry is now more or less a standard. However with this system you can encourage user-input on any type of content and not just blog entries such as Web Pages, FAQs, Announcements, Web App Items, Products and more.



This is an example of implementing the Comments feature to encouraging user feedback on food recipes (web app item) published on a web site.



How Comments work

It's important to understand how the Comments feature works. In effect there are two sides to this feature.

The first part is the Comments form that allows customers to rate something, write some feedback and optionally identify who they are by a way of providing a name and an email address. You can add this form to any type of content. You can also customize the form after inserting it and remove any of the fields that you don't require.

All comments require approval, i.e. when a new comment is made it does not become available on your website until you have approved it. Once you do, then it will appear on your website for the item it was entered for.

The second part of this feature is the modules that allow you to publish this content back on your website:

- **{ module_ratingrank }** – displays the average rank for the current item calculated from all the rankings given by visitors
- **{ module_ratingfeedback }** – displays the list of feedback provided for the current item. Refer to a later topic on how to customize the feedback layout.

Adding Comments to your website

There are a number of ways to add comments to your website. If you are adding this feature to a web page then it's just a matter of adding the relevant module to the web page. If you however wish to use this feature for FAQs, Announcements and so forth, then you need to insert the module in the relevant **Details template** for the given content type.

To add the Comments form or modules to a web page:

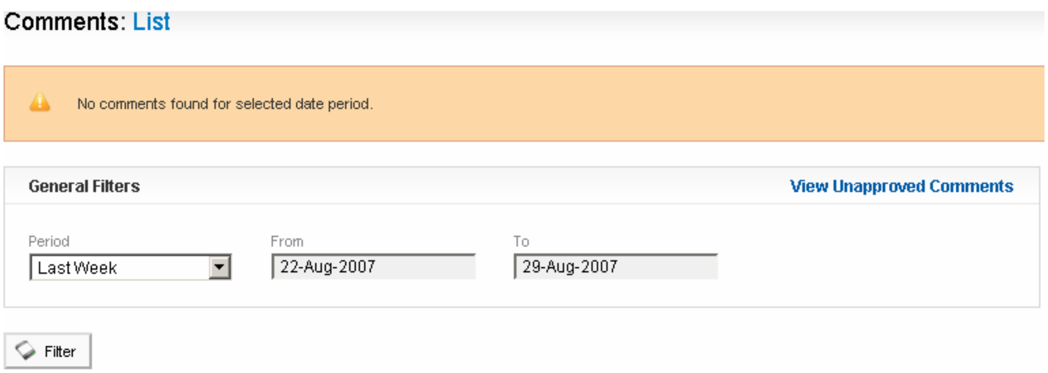
- Go to **Modules -> Comments** and choose the **Add comments to a web page** link.
- Use the **Module Manager** on the online WYSIWYG editor

Alternatively, you can use **Triangle** to add it to the page.

Reviewing Comments

There are two ways you can review the comments left by your website's visitors.

1. Go to **Modules -> Comments**. Here you can see and filter through visitor comments.

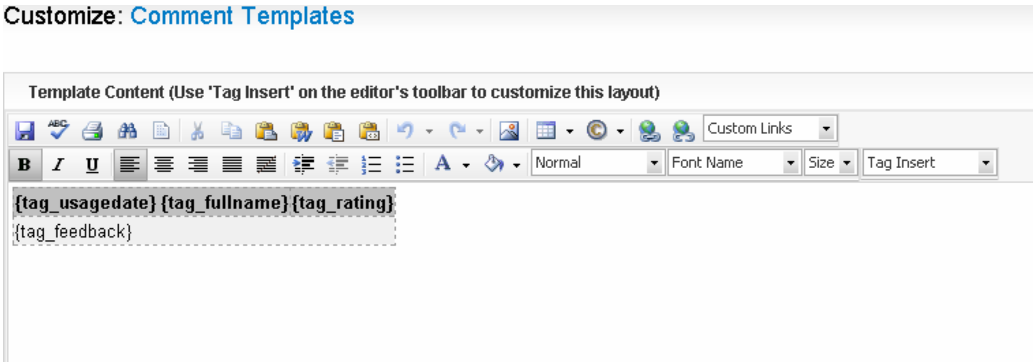


2. When viewing any content item, if it has new unapproved comments then you can see this in the bottom-right hand side of the screen in the Details tab.

Customizing how Comments appear on your website

Customizing the appearance of comments on your website is done much the same as customizing any other type of content. Go to **Admin -> More Customization Options-> Comments Templates** or use **Triangle**.

When you place the module { module_ratingfeedback } on your website, it uses this template.



12. Web Apps

12.1. Introduction

Web Apps framework allows anyone who is not technical to create powerful web-based applications. For example a real-estate listings application can be created where listing can be displayed on any web page. You have complete control on the look and feel and the layout of listings. Listings can also be searched through using a point-n-click search builder functionality which can be added to any web page. Customers searching through real estate items can add them to their "favorites" list and easily retrieve these in the future.

You can create just about any Web Apps including book reviews, travel packages, job listings, customer testimonials or car catalogues (as shown on the right). In fact, you can use Web Apps to create almost anything.

Ford Escape

The 2005 C240 Luxury Wagon

2.6L 18-valve V6 engine

168 hp @ 5,700 rpm rpm

Welcoming. The C240 Luxury wagon combines the versatility and cargo capacity of a wagon with the driving dynamics of the C-Class sedan.

$34,870.00

Ford Explorer

The 2005 C240 Luxury Wagon

5.0L V8 engine

255 hp @ 3,700 rpm rpm

Welcoming. The C240 Luxury wagon combines the versatility and cargo capacity of a wagon with the driving dynamics of the C-Class sedan.

$44,870.00

Ford Fairlane

The 2005 Luxury Ford Fairlane

5.4L V8 engine

220 kw @ 5,400 rpm rpm

The Fairlaine is a prestigous, refined and sporty handling.

$57,990

12.2. Key Web App Concepts

The most important thing when designing your web app are the items that make up your web app. Each web app is defined by its name and the data fields in its items. Each data field has:

- A name, which should be descriptive of what the field means
- A type, which indicates what type of information the field holds - such as free form text, or a set of options, or a date.

So before you create your web app, you would first consider what information you need to store. For example, let's consider a **Real Estate** agent wanting to create searchable listings of properties. An item in this case would be a property, so the information we might want to store would include:

- Address - Multiple lines of Text
- Price - Text
- Photo - Image
- Description - Text
- Date Available - Date
- Property type – List, e.g. Freestanding, Unit, Townhouse
- Number of bedrooms, List, e.g. Studio, 1,2,3,4,5+

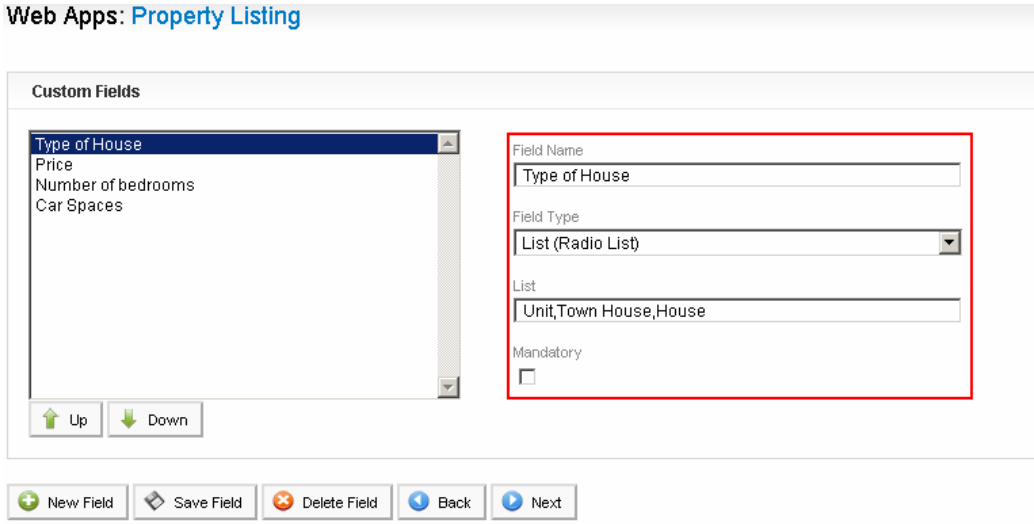
Every Web App Item has a default "Name" field.

If in the future you think of more fields to add (e.g. "Agent Name") to your web app you can do so easily. The only thing that cannot be changed is the field type - once a field is set as type "Date", for example, it cannot be changed.

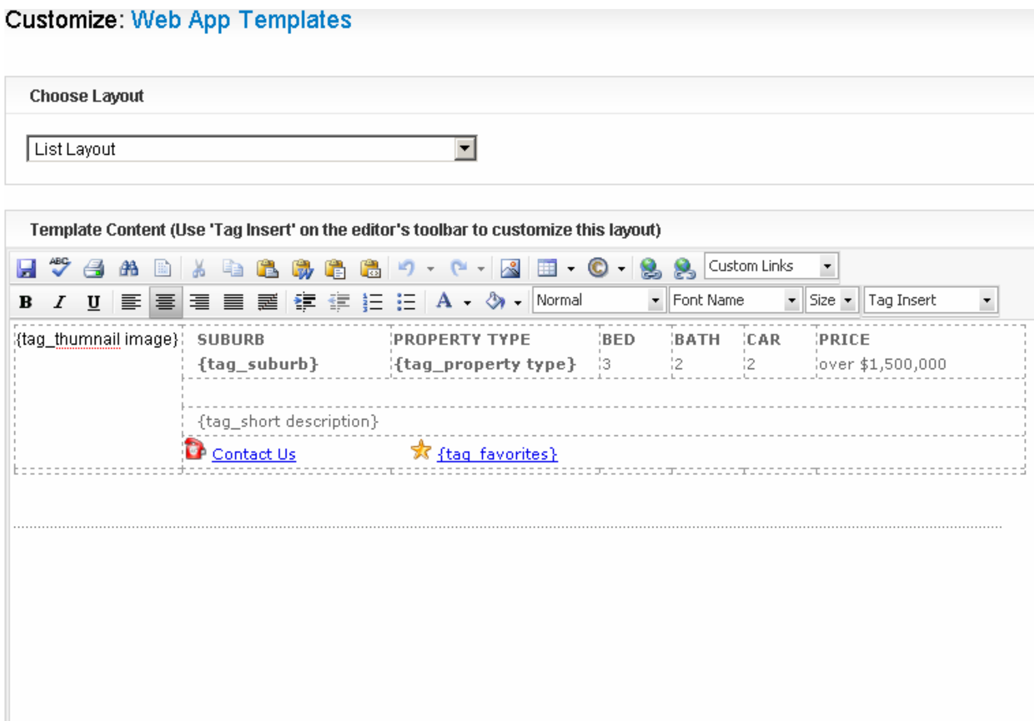
12.3. Creating a Web App

Creating a Web App is simple. Go to **Modules -> Web Apps** and click the **Build a new Web App** link. Give your Web App a **name**, for example "Property Listings"

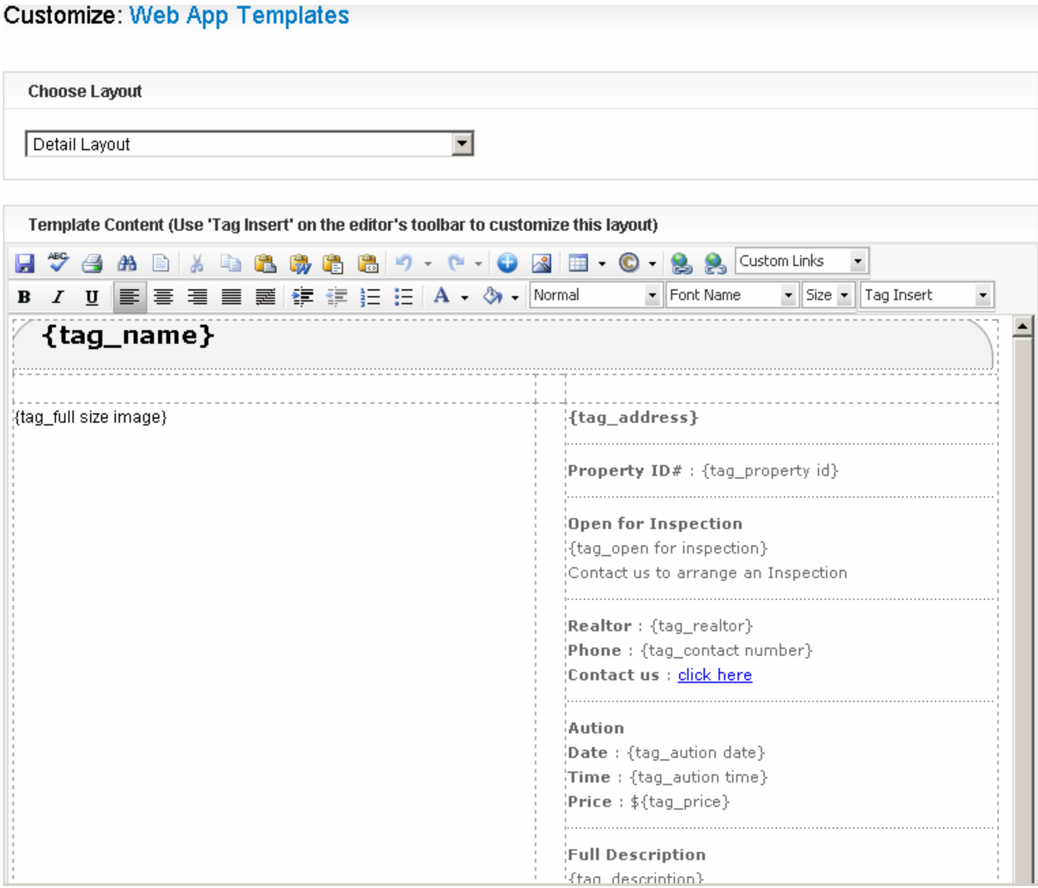
We'll create the Web App described in the section above as an example. For each field, we type in the name and select its type.



Now we can customize how to display the property listings. There are two templates that we can use to customize the layout of our web app items on our web pages. These include the browse-able **list** or the **details** template which is used to display a single web app item. First we'll customize the **list** template to show the property type, the number of bedrooms, an excerpt from the description and the price.



Now in the **details** template we will display all of the details of the property, including the picture of the property and the full description.



Note: Unlike other forms of content Web Apps have a third template which is a **backup list** template. Often you may want to display the list of items for a particular web app on your home page as well as another web page. You can use the list template and the backup list template to display the same web app items differently on various web pages.

12.4. Managing a Web App

Once we've created our Web App we are ready to add items to it. As this is a Real Estate web app, we are now ready to add property listings. In fact once you create your web app and customize it, you are unlikely to work with the web app again. Henceforward you will be dealing with **Web App Items**, e.g. you will be adding and removing properties.

Adding Items

First we need to add a new property. We go to **Modules -> Web Apps -> Property Listings** and then click **Create a new Web App item** link.

First we provide a name for the Property Listing in the default "Name" field. Now fill in each of the other details, completing the listing for that property.

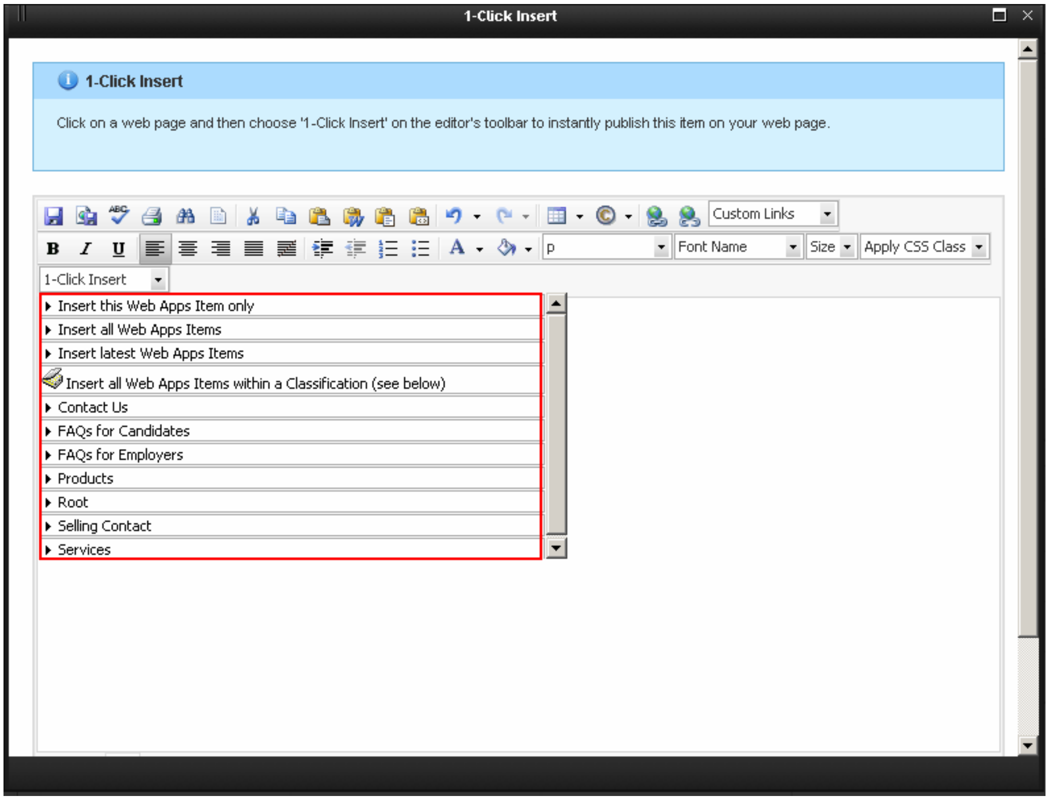
Making Web App Items Browse-able on your site

Now that you have created your web app, you can enable your clients to browse or search your items on your site. You can:

- Insert a single web item on a web page
- Insert a list of web app items on a web page
- Add a search box so visitors can search through web app items

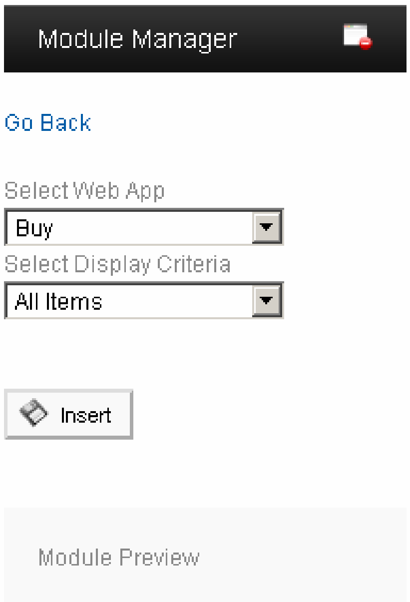
Inserting Web App Items on a web page

Adding a single Web App item to a web page is a simple process. Select any Web App Item and click **Add item to a web page** link and choose the web page to drop the module on.



To insert a list of Web App Items, go to Website -> Web Pages and choose the web page you want your list of items to be on. You may have already created a web page called "Properties". Click on the web page and go to the **Editor** tab. Now click on the Module Manager and choose Web Apps - in this case "Property Listings"

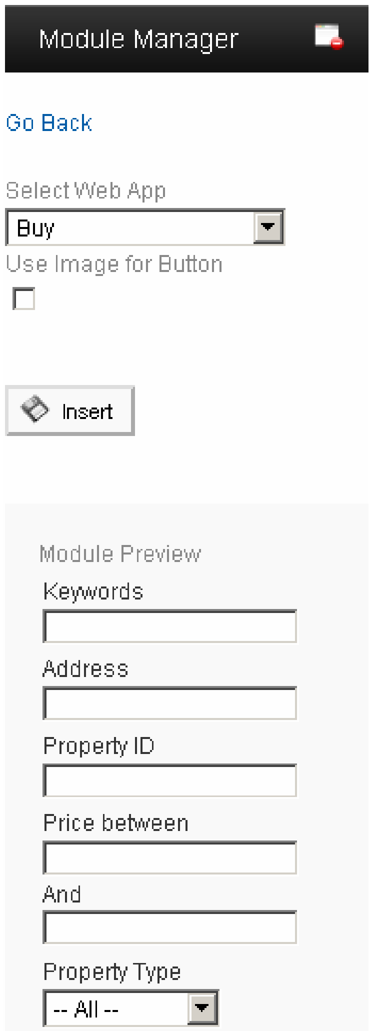
Now choose your display requirements, and click OK.



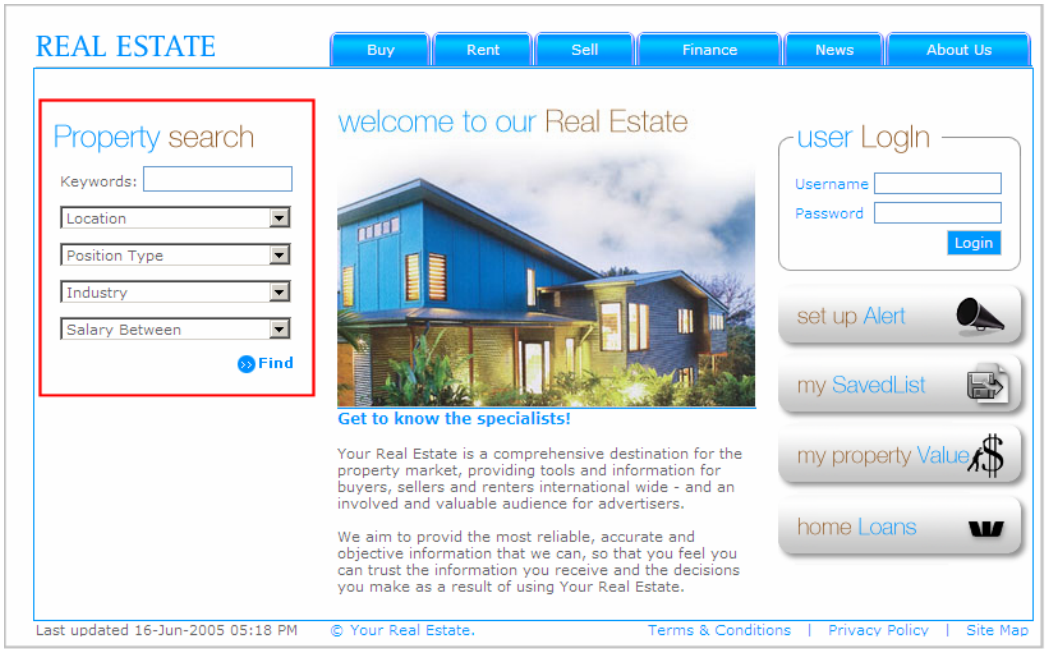
Making Items Searchable

Go to Website -> Web Pages and choose the web page you want your search box to be on. We've called this web page "Property Search". Click on the web page and go to the **Editor** tab, then click on the Module Manager and choose **Web App Search**.

Choose your web app - in this case "Property Listings", and click OK.



This search form will enable your customers to search through all the Properties. You can customize the search form significantly. You can do this be removing the fields you don't want to search on, and include only the ones you want to search on.



Note: The search results will appear under the search form. Refer advanced features to have them appear on a separate web page.

12.5. Advanced Topics and Techniques

Web App Module Parameters

By default the List template is used when displaying Web App items on a web page. You can make small changes to this module in order to customize the list of Web App items displayed on a web page.

Ordinarily the module appears like so:

{ module_webapps, ID, filter, itemID, notUsed, targetFrame, useBackup }

ID – system generated id (do not change)

filter – system generated (do not change)

itemID - system generated (do not change)

notUsed – leave empty

targetFrame – e.g. _blank. Specify the frame you want the item to open in

useBackup – specify True if you want to use the backup list template or leave empty

resultsPerPage – total number of items per page before pagination is used

hideEmptyMessage – specify True if you don't want the "No items found." message to be displayed.

e.g. to use the back template:

{ module_webapps, 123, a, , , , true }

Or to only display 12 items per page

{ module_webapps, 123, a, , , , , 12 }

The previous and next links can be customized using CSS. Each link has its own custom CSS class. To see the CSS class assigned to these links view the web page source where these links appear. The CSS class name format is: WebAppIDPrev and WebAppIDNext where ID is the internal ID assigned to your Web App.

Placing Search Results on a different web page

By default, the search results for a web app search module are displayed on the same web page where the search module was inserted. You will notice **{ module_webappsresults }** appended below the web app search form. However you can customize and have the search results appear on a different web page. If you add the module to a template, then you must customize the form to specify the web page to display the results on.

To customize, add your web app search form to any web page and go into the HTML view. Locate the opening <Form> with this action URL:

action="/Default.aspx?CCID=X&FID=Y&PageID={ module_oid }">

Replace PageID={ module_oid } with ID=URL of your results page. Your web page URL must start with a slash (/). E.g.

action="/Default.aspx?CCID=X&FID=Y&ID=/Results.htm">

You can customize the Web App search results:

{ module_webappsresults, notUsed, targetFrame, useBackup }

notUsed – leave empty

targetFrame – e.g. _blank. Specify the frame you want the item to open in

useBackup – specify True if you want to use the backup list template or leave empty

e.g.

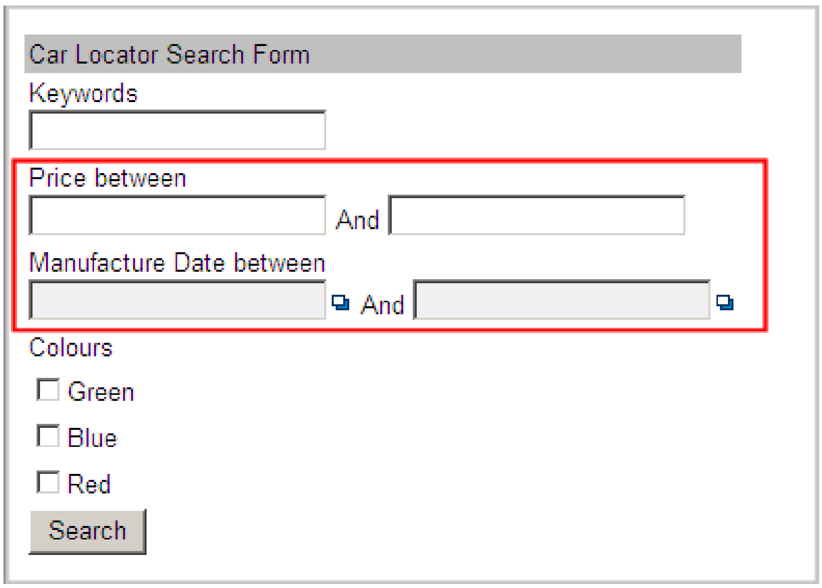
To use the backup list template when displaying search results:

{ module_webappsresults, , , true }

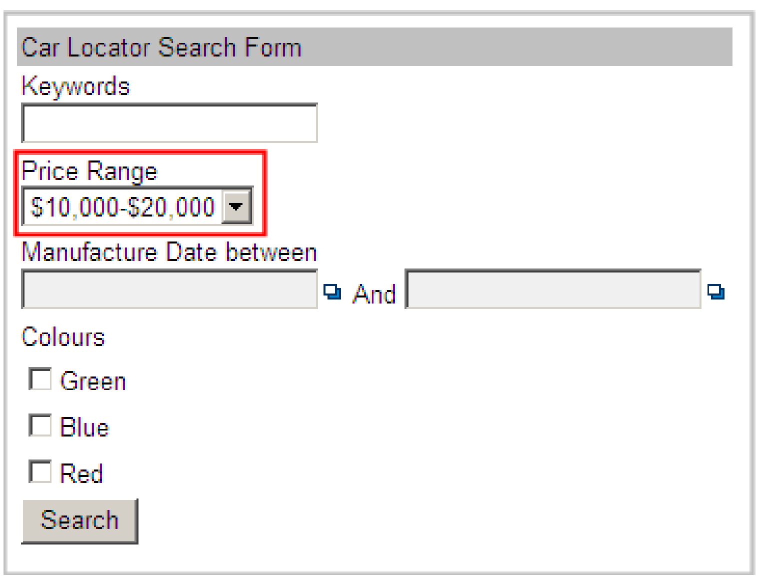
Advanced search customization
In an earlier topic we discussed how to easily add a web app search form to any web page. You can make a number of customizations to this search form:

- You can re-arrange the fields to suits yourself
- You can add your own CSS classes to each field
- You can remove fields that you don't want to appear
- You can change the format of any date or numeric field. By default these fields appear as a range in the search form, e.g.:

This the **Default search layout for date and numeric fields**



In this example the Price field has been changed from a range to a drop down.



By default number and date fields will appear as:

```
Price between<br>
<input class=cat_textbox maxLength=255 name=CAT_Custom_11125_Min> And
<input class=cat_textbox maxLength=255 name=CAT_Custom_11125_Max>
```

You can change this to:

```
Price between<br>
< select class=cat_textbox maxLength=255 name=CAT_Custom_11125 >
	< option value=”0,10000”>Up to $10,000</option>
	< option value=”10001,20000”>$10,001-$20,000</option>
	< option value=”20001,30000”>$20,001-$30,000</option>
	< option value=”30001,40000”>$30,001-$40,000</option>
< /select>
```

You can similarly apply the above technique to date fields:

```
Manufacture Date<br>
< select class=cat_textbox maxLength=255 name=CAT_Custom_11126 >
	< option value=”1-Jan-1900,31-Dec-1989”>Older than 1990</option>
	< option value=”1-Jan-1990,31-Dec-1999”>1990-1999</option>
	< option value=”1-Jan-2000,31-Jan-2010”>Newer than 2000</option>
< /select>
```

With date fields you can also use this approach:

```
Manufacture Date<br>
< select class=cat_textbox maxLength=255 name=CAT_Custom_11126 >
	< option value=”today”>Today</option>
	< option value=”yesterday”>Yesterday</option>
	< option value=”lastweek”>Last Week</option>
	< option value=”lastmonth”>Last Month</option>
< /select>
```

Note: Ensure you use the correct name for each field. With date and numeric fields the two fields associated for each field end with _Min and _Max. If you are using the above approach then this ending is removed.

Working with Images and Flash files

If you've added an Image field to your web app, then all image fields will have a link if the tag is used in the list template. The following is a list of advanced options relating to image fields:

- To remove the link behind image tags simply append _NoLink e.g. change {tag_myimage} to {tag_myimage_nolink}
- You can set a width and height for every image used for web app items. When you are adding a new web app item and have picked the image, make the following change: **/Images/MyImage.gif** to **/Images/MyImage.gif,200,100**.
- You also put flash files (.swf) in any image field. The system will correctly display the flash. You can also use the same width/height technique discussed in the previous point for your flash files.

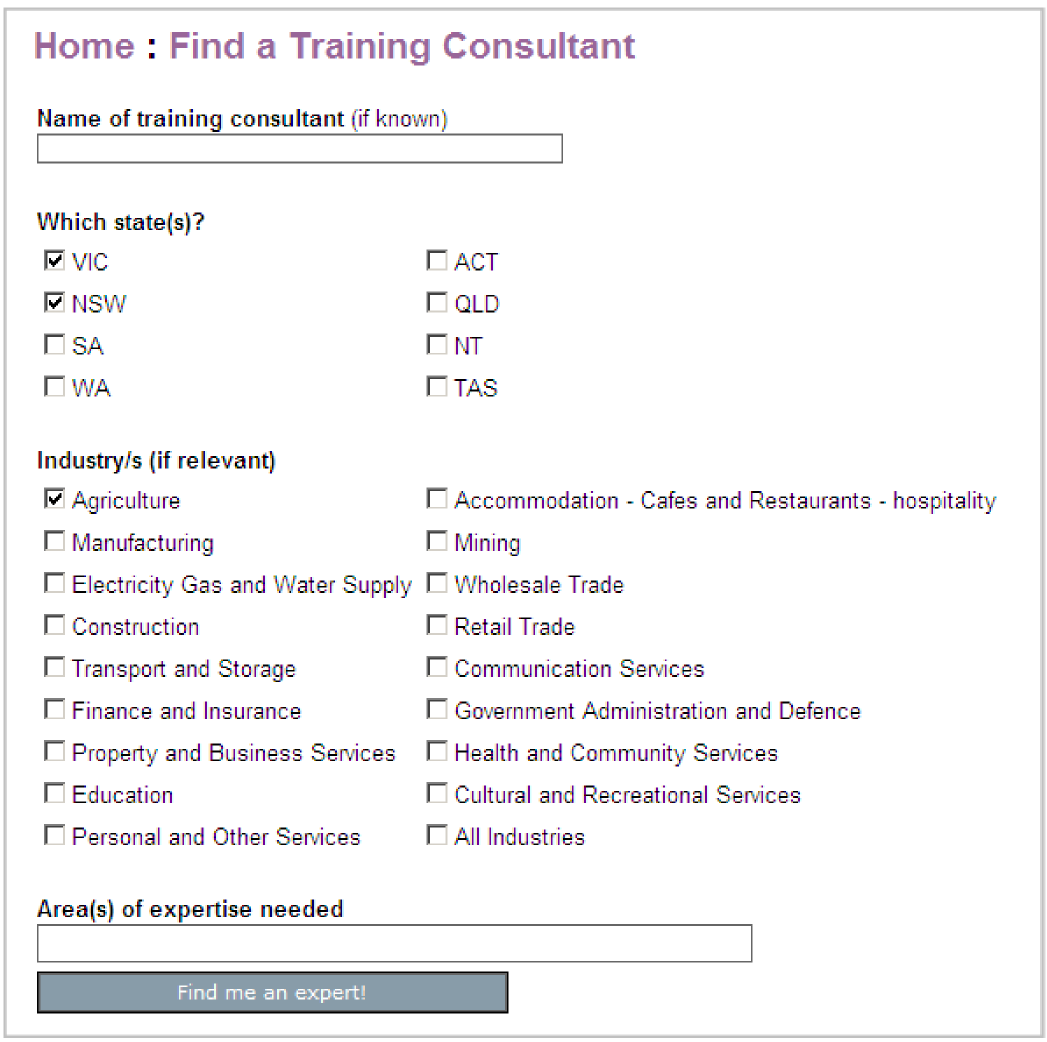
How does the searching work

It's important to understand how the search works when customers search through the items of a particular web app.

By default all search forms contain a **Keywords** fields. This field will search through the Name and Editor content of the web app item. You can remove this field from the search, although it is not recommended.

When the search query is constructed, an AND is used between the criteria of each field. However when multiple values are selected from one field such as a checkbox or listbox field, then the conditions in the field are ORed whilst conditions between fields are ANDed.

Looking at the criteria selected in the web app search form below, **the search would retrieve all Training consultants who are (either in VIC OR NSW) AND have expertise in Agriculture**.


Home : Find a Training Consultant

Name of training consultant (if known)

Which state(s)?

- [x] VIC
- [ ] ACT
- [x] NSW
- [ ] QLD
- [ ] SA
- [ ] NT
- [ ] WA
- [ ] TAS

Industry/s (if relevant)

- [x] Agriculture
- [ ] Accommodation - Cafes and Restaurants - hospitality
- [ ] Manufacturing
- [ ] Mining
- [ ] Electricity Gas and Water Supply
- [ ] Wholesale Trade
- [ ] Construction
- [ ] Retail Trade
- [ ] Transport and Storage
- [ ] Communication Services
- [ ] Finance and Insurance
- [ ] Government Administration and Defence
- [ ] Property and Business Services
- [ ] Health and Community Services
- [ ] Education
- [ ] Cultural and Recreational Services
- [ ] Personal and Other Services
- [ ] All Industries

Area(s) of expertise needed

Find me an expert!

Using Alternate Row CSS tag

When displaying a list of web app items on a web page you can apply use a technique that applies an alternating style sheet class for each alternating row.

For example, imagine a simple list template for a particular web app:

<div class=”{tag_rowcss,myclass}”>{tag_name}</div>

When the list of items for this web app is displayed, the above template will render out as follows:

<div class=” myclass”>Item 1</div>

<div class=” myclass_alternate”>Item 2</div>

<div class=” myclass”>Item 3</div>

<div class=” myclass_alternate”>Item 4</div>

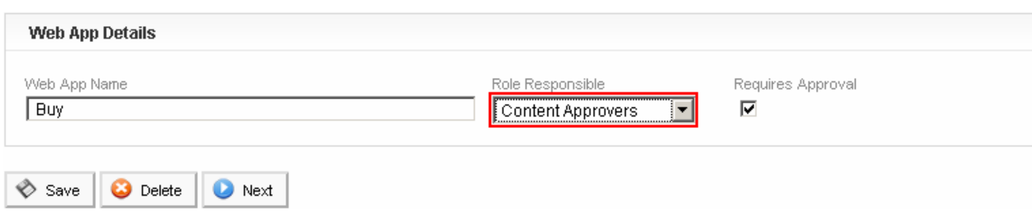
Note: The style sheet class “myclass” can be any class name that you specify.

Web App Customer Input Form

The Web App Customer Input Form allows your customers to securely submit items for any Web App via your website.

Implementing this functionality is extremely easy to do. Simply insert this form into any *secure* web page.

Please keep in mind that all items are *disabled* when submitted and must be enabled/approved by you. To be notified when new items are submitted ensure you choose the **Role Responsible** when creating your Web App (Admin -> Build Web Apps).



Using Web App Item Name in URLs (SEO Friendly)

All Web App item URLs in the system are in the format of: http://www.yourdomain.com/CustomContentRetrieve.aspx?ID=XYZ. Although the URL for every Web App item is permanent and does not change, you can choose to use a different format for your item URLs to ensure a higher level of SEO friendliness.

When creating links to your Web App items from any web page or your navigational menus you can use the following format:

http://www.yourdomain.com/_webapp/WebAppItemName

So if your Web App item is called **Grilled Fish Recipes** then your URL would be:

http://www.yourdomain.com/_webapp/Grilled Fish Recipes

13. BOOKINGS

13.1. *Introduction*

If your business undertakes events or seminars where bookings are required then the Booking feature can help significantly streamline administrative tasks whilst helping improve overall customer experience. The booking feature enables your customers to **make bookings** on your website for specific events. The system will **track capacity** and will **send follow-up emails** to customers before, on and after the booking date to maximize customer experience.

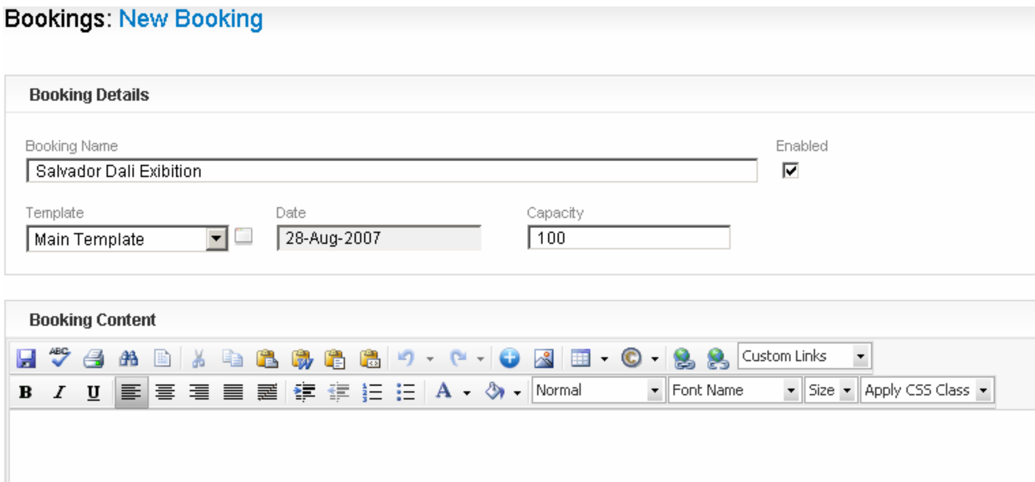
Here are some of the key features that will help you outperform your competitors:

- Manages bookings, capacity and customer experience
- Setup follow-up emails to be sent to customers before, on or after booking date.
- Setup auto-responder email to be sent to customers when booking is made
- Accept group bookings under one customer's name
- Completely customizable booking form
- Classify each booking event so they can be published easily on the web
- Ability to accept real-time credit card processing functionality in booking form
- Full booking history on a per customer basis

13.2. Creating a Booking

When you create an event booking you have to decide whether the event requires capacity management or not. Capacity management indicates whether your event requires the system to control the number of available spots and it should stop further bookings once the capacity limit is reached. If you don't require capacity management then you should leave the Capacity field empty, otherwise enter the number of spots available for your event.

Every event has a date. This is the date when the event takes place. Providing a date is mandatory and bookings can only be made up to and including today's date.



To create a new booking, go to Modules -> Bookings and click **Create a New Booking**

<u>The Editor</u>

After you provide the date and capacity of a booking you then proceed to providing its details. The details should consist of everything that is relevant to the event and useful for your customers. The editor's content is displayed in the **Details template** of a booking, i.e. when the customer selects a booking then its details are displayed. Refer to **Customizing Bookings** for more details on this.

13.3. Displaying Bookings on your website

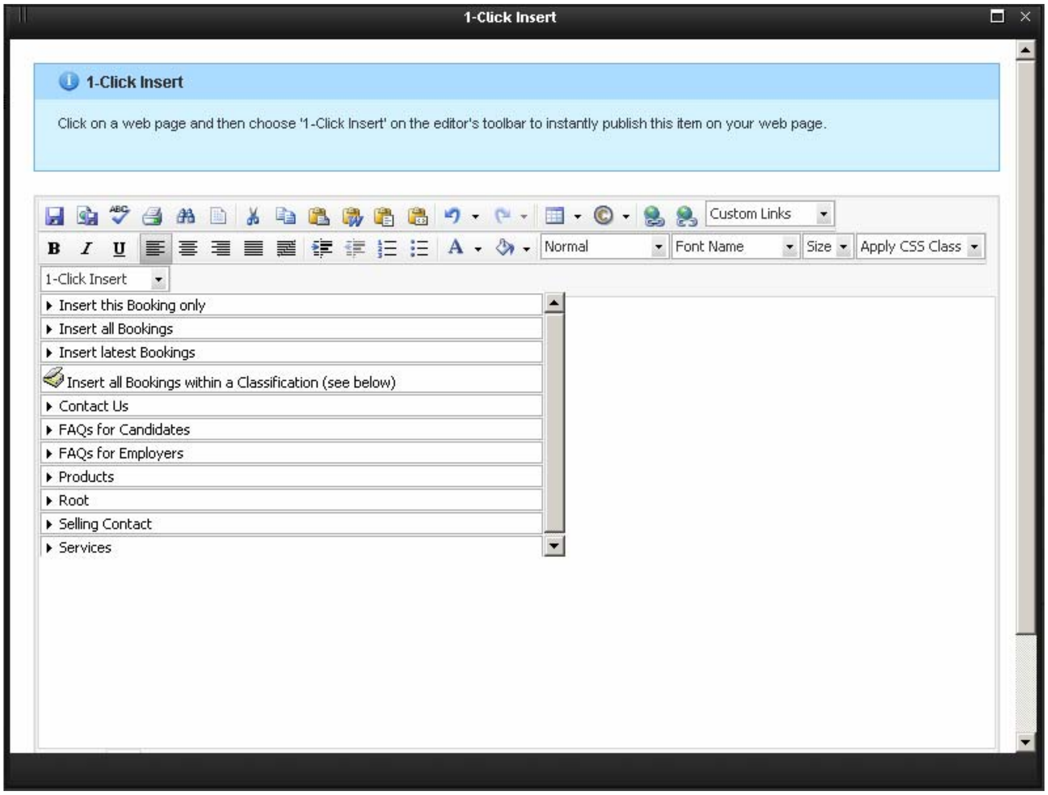
There are a number of ways you can display bookings on your website. If you use this solution for your entire website then 1-Click Insert puts a powerful set of options under your finger tips to effortlessly publish a booking or groups of related bookings on your web pages.

If you host your website at a 3rd party then you need to manually add a link to a booking which when selected will load the details of a booking and provide options for your customer to book themselves into it.

Using the full solution

To add one or more bookings to a web page simply click on the **Add Booking to a web page** link in Action Box.

1. Click the web page to add bookings to
2. On the toolbar of the WYSIWYG editor select from one of the 1-Click Insert options
3. Display this booking only - will place the booking module on the web page to display the current booking only
4. Display all bookings - will place the booking module on the web page to display all bookings in the system
5. Display all bookings within a classification - will place the booking module on the web page to display all bookings that you have previously classified in the selected category. Refer to Classifying Bookings below for more details.
6. Click on Save and Publish to complete



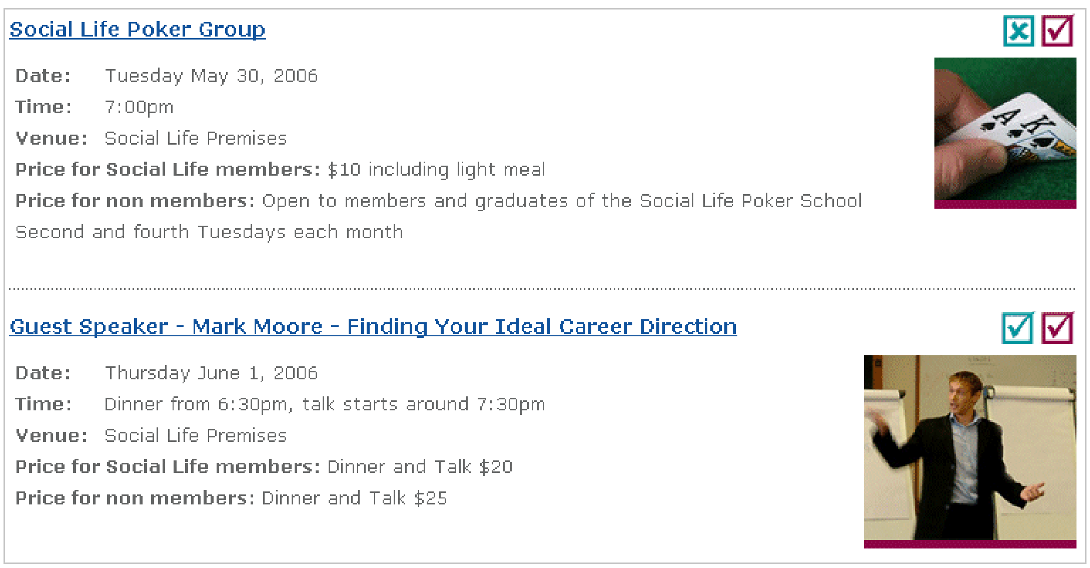
Now click on the Preview in new browser to see your web page and booking(s) in a web browser.

Using 3rd Party Hosting

If you are hosting your website at a 3rd Party then you must link to a booking. The URL for each booking is displayed in the Details tab. Simply create a hyperlink on an existing web page to this URL.

Bookings List (List Template)

You have complete control over how your bookings are displayed on your website. For example you may want to display all upcoming bookings on a web page or alternatively display related bookings together on separate web pages. Below is an example of the list view of bookings. This can be customized to suit your needs, see **Customizing Bookings**.



Booking Details (Details Template)

When a booking is selected from a list of bookings its details are shown to the customer. You have complete control over the layout and the look and feel of your bookings (see **Customizing Bookings)**. Below is an example of the detailed view of a booking.

Workshop Details

Business Success Workshop Wed 21-Jun (Spots: Available)

Workshop Details

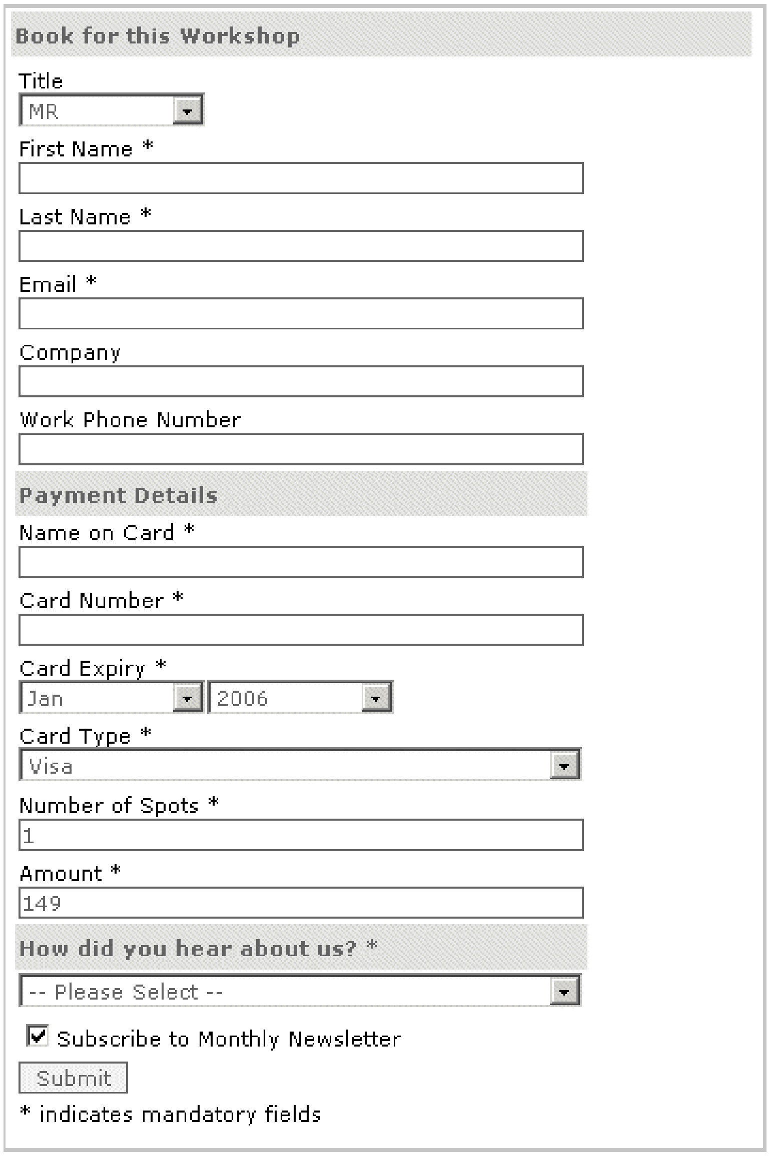
Trainer:	Adam Broadway
Venue:	Social Life, Suite 1, Ground Floor, 213-219 Miller St, North Sydney Map
Date:	Wednesday 21-Jun-2006
Time:	8am to 12:30pm
Price:	Only $149 (including GST). Normally valued at $495.
Inclusions:	Course material and light refreshments
Book:	• Use the form below • Download our booking form and fax or mail back • Call us on 1300 55 17 65 to book

Workshop Objectives

- The principles behind creating a successful online business
- Generate qualified leads from search engines
- Setup an online shop to sell your products and services
- Use the web to significantly reduce customer service costs
- Establish techniques for measuring the performance of your website
- Implement monetisation strategies that increase your profits
- Have a broad understanding of the tools that put you in control

Booking Form

The booking form collects your customer's details and allows them to actually book for the event. It is placed within the **Booking Details** template. You can customize the booking form to suit the needs of your business and add custom forms to it – see **Customizing Bookings.**



Book for this Workshop

Title
MR

First Name *

Last Name *

Email *

Company

Work Phone Number

Payment Details

Name on Card *

Card Number *

Card Expiry *
Jan 2006

Card Type *
Visa

Number of Spots *
1

Amount *
149

How did you hear about us? *

-- Please Select --

Subscribe to Monthly Newsletter

Submit

* indicates mandatory fields

13.4. Classifying Bookings

Bookings may be assigned to one or more categories. Each event that your business organizes can be **classified** within a subject. When you classify events in categories you **make it easy to publish them on web pages**, by allowing you to group related bookings together. Here is how classification works:

Imagine you are a financial advisory business which holds seminars educating individuals on Tax matters as well as Superannuation matters. You have a series of seminars in each topic coming up over the next few months. You can assign the tax related seminars under the "tax" category and the superannuation seminars under the "superannuation" category. Assign a classification under the classifications tab, by moving your desired classifications from left to right.

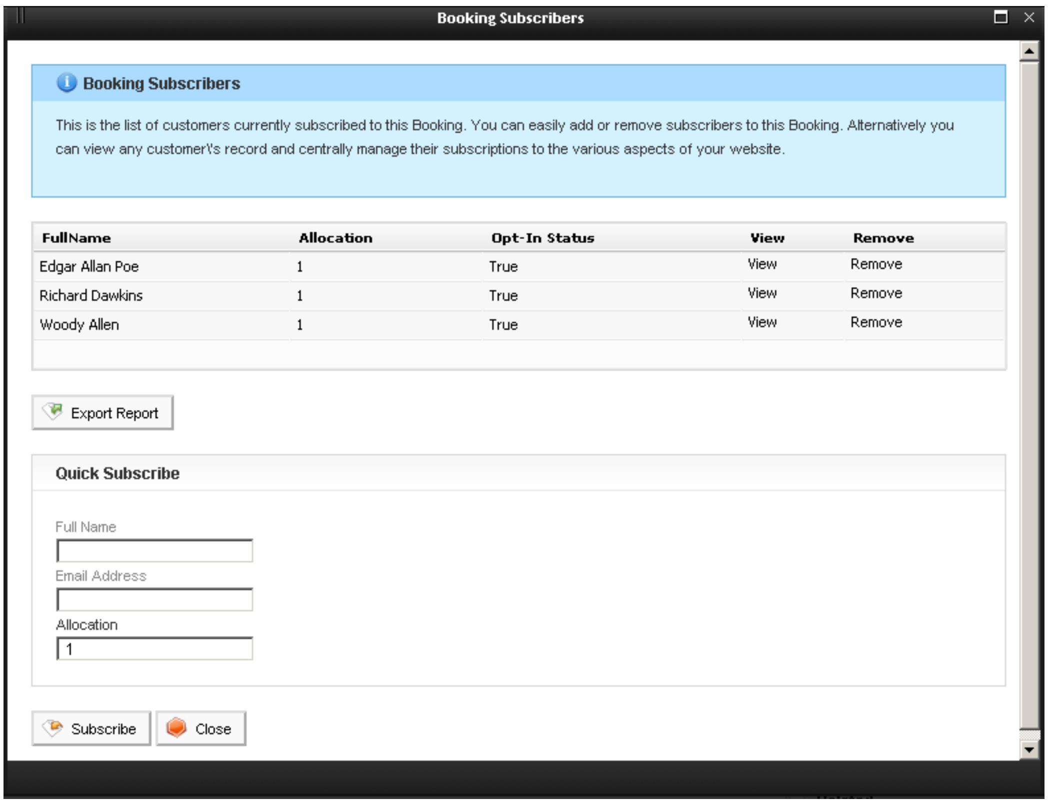
By classifying bookings you **can publish groups of them** at once on any web page. For instance by placing the booking module on a web page that displays all superannuation seminars, as you add more seminars related to superannuation they will **automatically appear** on your website without any further editing of web pages required. When a booking is held and is in the past it is automatically removed from your website.

Note: You can manage your category list and create new categories that are relevant to your business! This is done under Admin -> Manage Categories.

13.5. *Making a Booking*

There are two ways customers can book for an event.

1. The customer fills in the booking form on the website. This is the most common method
2. The site owner can manually add a customer to one of your events. This is done via the **View list of Subscribers** link when viewing a booking in the administration or via the **Customer Bookings** link when viewing a customer's record.



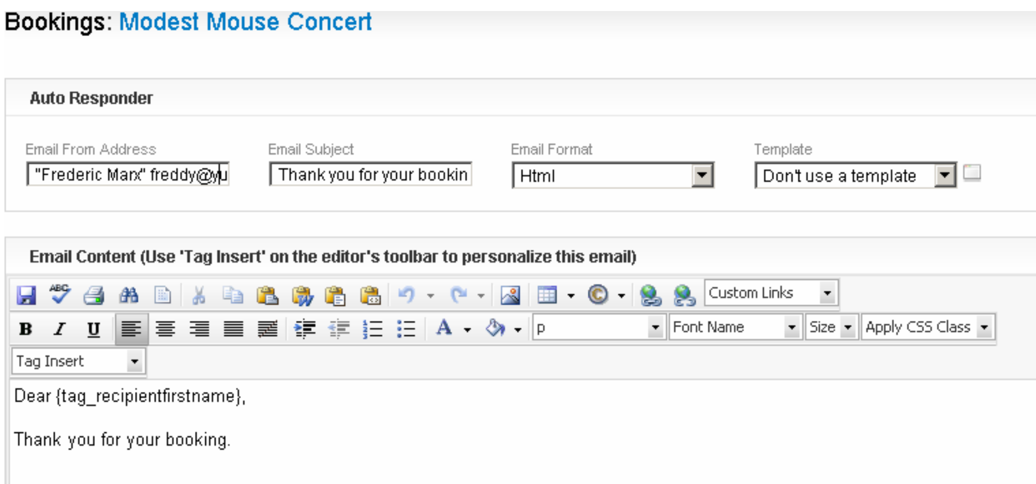
13.6. Booking Rejection

There are a number of reasons for the system to not accept a booking, these include:

- The customer is **already booked** for the event (the system uses the customer's email address for identification)
- The booking has **reached capacity**
- Booking date is **in the past**
- Booking is **no longer available**, e.g. disabled or deleted

13.7. Booking Auto-Responder

The booking auto-responder is an email that is sent to a customer when they make a booking to an event. Generally the auto responder email should contain information about the event, include a thank you note and any other information that is relevant and important to your customers. Auto responder emails are mandatory and are always emailed to customers.



You have complete control over the content and look and feel of your auto responder email. You can set the "from" name, the email address from which the auto responder is sent from, the format of the email, e.g. HTML or text and the content. If you have access to the entire solution you can also choose a template that is used for your email to conform to your corporate identity.

13.8. Follow-Ups

Follow-ups are a fundamental part of the bookings feature. Follow-ups allow you to **automate communication to the subscribers of a booking** using email before, on or after the booking date.

A typical follow up scenario might go like this:

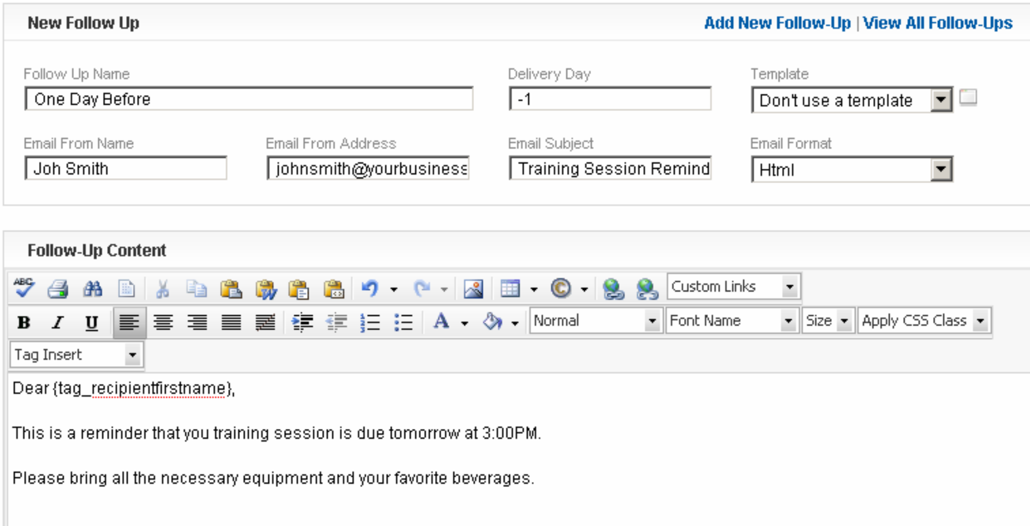
- **1 week before** the event, a short thank you and reminder of the event
- **1 day before**, remind them again, providing detailed information on the venue, the speakers and a map to get to the venue
- **1 day after**, thank them for their attendance and ask for feedback via a feedback form
- **1 week after**, notify them of another upcoming event - would they be interested?

The system allows you to enter in these follow up emails for a booking. The system will then automatically email your customers and inform them with the content previously defined by you on the dates that you set.

To **create a follow-up**:

1. Click on the **Create Follow-Ups Emails** link
2. Click on the **Add New Follow-up** link

3. Enter the **follow-up details** including:
    a. Email address
    b. Subject
    c. Email Content
    d. Choose the appropriate Delivery Day.
        i. For a follow-up to be sent 7 days BEFORE the booking date your Delivery Day should be -7 (minus 7).
        ii. For the follow-up to be emailed 1 day before an event set the Delivery Day to -1.
        iii. For a delivery on the day of the booking enter 0 (zero) in the Delivery Day input box.
        iv. For follow-ups to go after the booking date, simply enter a positive number, e.g. 1 for 1 day AFTER the booking date and so forth

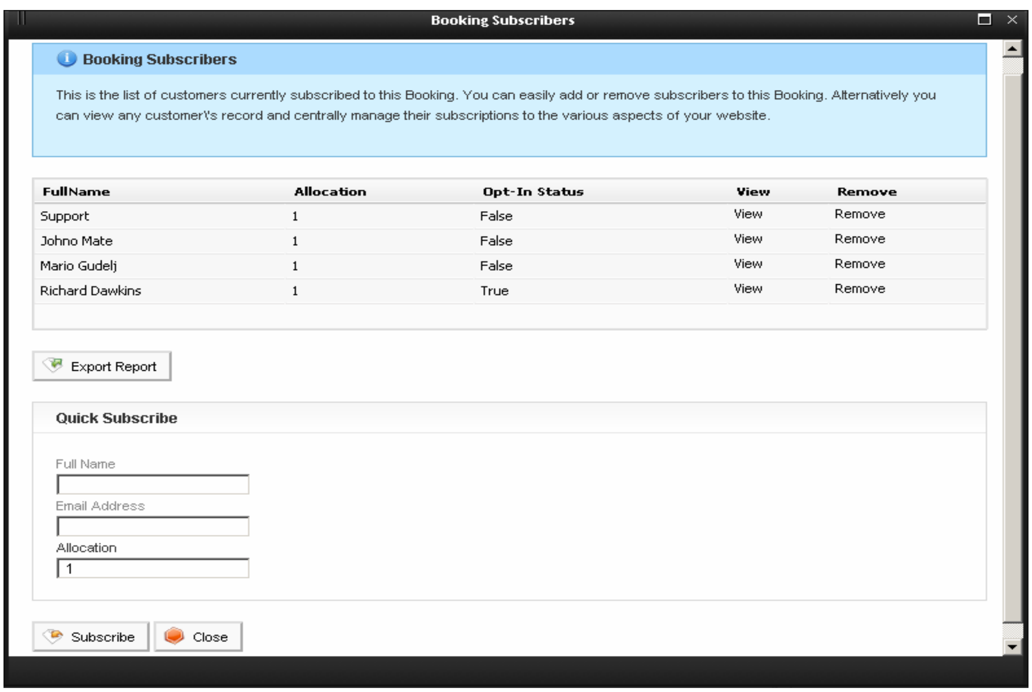


4. Click **Save** to complete the creation of your Follow-up

Add more follow-ups as required

13.9. Subscribers

The **View the List Subscribers** link displays the list of customers who are currently booked for the current booking. You can manually add other customers to your booking using the Quick Subscribe form in this tab. You can also remove customers from this booking by selecting the Remove link next to each customer.



13.10. Customizing Bookings

All aspects of a booking can be customized to suit your needs. Bookings are similar to Announcements and FAQs - there are two templates that you can customize to ensure bookings appearance is inline with your expectations. These templates come pre-configured and you should only explore them if you want to further customize the appearance of bookings. All customization of these templates can be done under **Admin -> More Customization Options**, then "**Booking Templates**"

The List Template

The List template defines how a group of bookings are displayed on a page. For instance if you are holding a series of 4 seminars in the month of August, then you may want to display all of them on a web page. The list template controls how these 4 bookings are displayed together on a web page.

You may move each tag to the position you desire, and add new tags via the tag manager or tag list.

The Details Template

Details template defines how a booking is displayed after it has been selected. In this instance once a customer chooses one of the upcoming seminars in August it is loaded and displayed exactly how you have setup your booking Details template.

If you are already familiar with customizing Announcement or FAQ templates you know that the appearance of these types of content is entirely customizable. Layout, style sheets, colors and the information that is displayed is controlled and positioned as you want it, via the use of tags and the tag list.

Booking Form

All bookings within your system will use the same List and Detail templates. Generally the Detail template will contain a web form which is used as your booking form. This approach means one form is universal for all bookings, i.e. one booking cannot use a different booking form to another booking. However, if you require a different booking form for various bookings then you will need to remove the booking from the Detail template and place it instead in the "Editor" tab for each booking. You can easily create booking forms using the web forms feature. After you have created your web form you must insert it into the Booking Detail template. Ensure you delete the existing web form on this template. Only one web form can be placed on this template.

13.11. Advanced Topics and Techniques

Collecting Payments

If you require **payments** for bookings you may integrate a payment option in your booking form. If you are familiar with the web forms feature then you would know that is very easy to add real-time credit card processing to any web form. When you customize a web form to use as your booking form you can include the Credit Card Processing option within this form. The form does not know how much each booking costs, hence you would **hard code this value** in the **Amount input field** within your booking form. You can write your own JavaScript code that can automatically calculate the total cost of the booking when a customer requests a different number of spots to the event.

Booking Multiple Seats Under One Name

By default a booking form reserves one spot for each person. And each person may only ever book one spot to a booking. However it is possible to make changes to your web form so customers can choose the number of spots for a booking.

To do this add the following field to your booking form:

```
<input type=text name=”BookingAllocation” >
```

If you wish to set a maximum number of spots a customer can book, then this can easily be achieved using JavaScript, the example below will allow up to 5 spots to be booked by a single customer.

```
<input type=text name=”BookingAllocation” onChange=”if (this.value > 5)
this.value=5;”>
```

Customizing the Confirmation Message

By default a system message is displayed every time a booking is made. You can customize this message via **Admin -> More Customization Options -> System Messages**.

You can also configure your booking form to go directly to a web page that you designate. This web page can be hosted with Your Online Business or a 3rd party hosting provider.

To do this you need to append the following to your web form's action URL:

e.g.

action="/FormProcessv2.aspx?........"

change to:

action="/FormProcessv2.aspx?........&PageID=/Results.htm"

You can also use JavaScript to conditionally set the confirmation web page of a booking form. For example if a customer is choosing their City, then if the customer choose LA then you can redirect to the LA landing page and for San Francisco you can redirect to the San Francisco landing page. Refer to the Support Forums for examples of this.

14. WEBSITE SEARCH ENGINE

14.1. Introduction

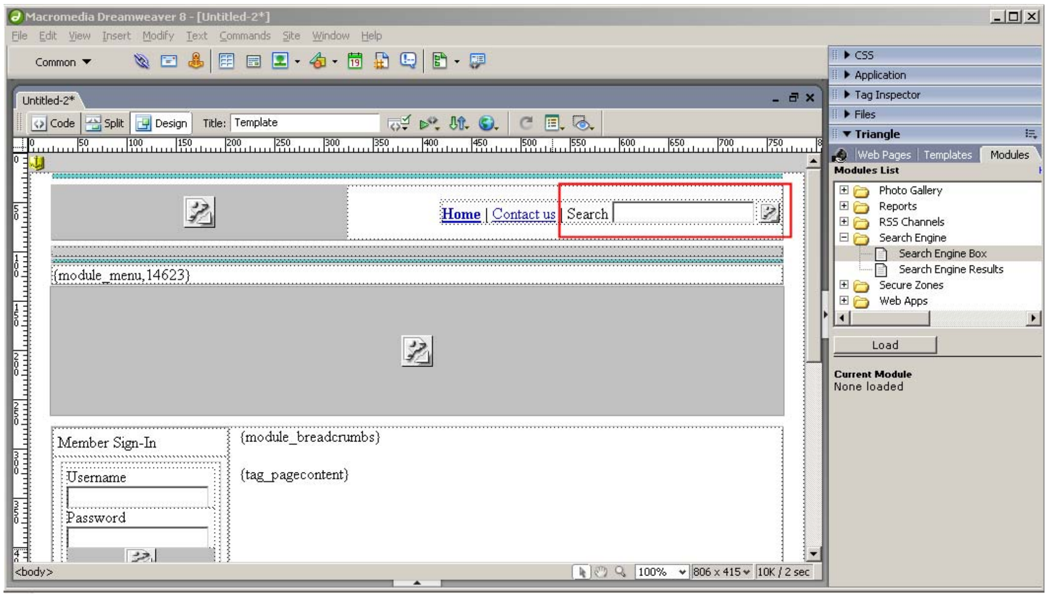
The Website Search Engine allows you to provide full site search functionality to your customers quickly and easily, without coding. The system's site search functionality allows you to search through:

- Web page content
- Literature documents (PDF, MS Word and most other popular document formats)
- Announcements
- FAQs
- Web App Items

Note: When using the search engine, if an item matches a query it is displayed, regardless of whether the item is secure or not. However when a secure item is selected only visitors currently logged in to the secure zones will be able to view the details of the item.

14.2. Adding a Search Engine to your website

The website search engine feature can be added within in seconds. **You don't need to configure anything**, just add a Search box to your template or web page using the Module Manager. Simply select Search Engine Box.



14.3. Specifying the Web Page to display search results on

By default, the search results for the search engine module are displayed on the same web page where the search module was inserted. You will notice **{ module_searchresults }** appended below the search form. However you can customize and have the search results appear on a different web page. If you add the module to a template, then you must customize the form to specify the web page to display the results on.

To customize, add your search engine form to any web page and go into the HTML view. Locate the opening <Form> with this action URL:

action="/Default.aspx?A=Search&PageID={ module_oid }&Collections=X">

Replace PageID={ module_oid } with ID=URL of your results page. Your web page URL must start with a slash (/). E.g.

action="/Default.aspx?A=Search&ID=/Results.htm&Collections=X">

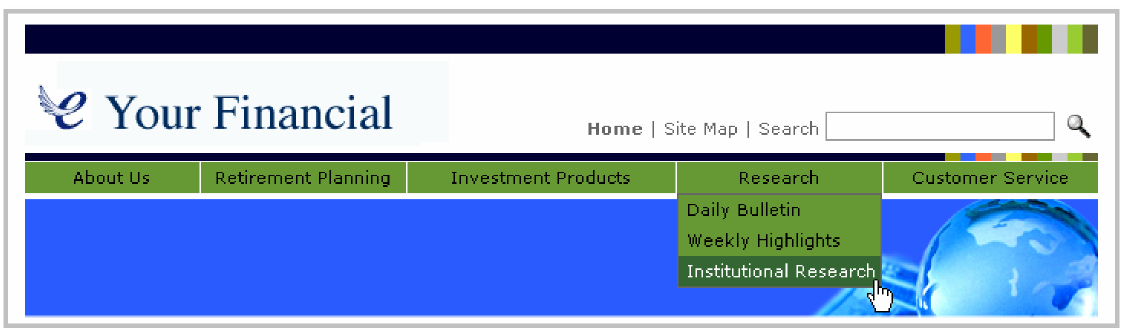
15. Dynamic Menus

15.1. About Dynamic Menus

Even with the best possible design of any single page, your site will fail to attract visitors if not equipped with a neat, consistent, and intuitive navigational interface. Every web page of your website, must provide clear answers to the questions your Web Visitors will ask, "Where am I?" and "Where do I go from here?" The principal tools used for navigating a website is a set of buttons commonly grouped on each web page into a navigation bar or navigation panel.

Dynamic Menus allow you to create and maintain navigation menus for your website. You can place Dynamic Menus onto your web pages that are lightweight, standards-compliant, and accessible and work in all popular web browsers. You specify the menu names and structure within the easy to use interface and choose the dynamic menu styles and colors you prefer. Displayed below is an example of a Dynamic Menu in action.

The main advantage of the Dynamic Menu feature kicks in after you have launched your site. If you decide to edit your menu by adding or deleting new items or even change the look and feel, all this can be done centrally where the changes become instantly accessible on your website – without doing any programming!



15.2. Creating a Dynamic Menu

Dynamic Menus are created within the Administration area of the system, under **Website -> Dynamic Menus**. Dynamic Menus are first created, then added to your Web Pages or Templates. You can create as many menus as you like including **horizontal and vertical menus**. You can create menus consisting of text, images or both. You can even use your own CSS classes down to each menu item!

Start by clicking **Create a new Dynamic Menu**, and then enter a name for your new menu. Click **Save** so we can start building the menu.

Here's a quick rundown of what some of the tabs allow you to do:

- The **Add/Edit Menu Items** link allows you to add, update, customize or delete Menu Items. If you use your own CSS classes for menu items then the **Item Look** tab plays no part for your menu.
- The **Customize Menu Look** link allows you to set the look and feel of the overall menu. You can set whether the Menu is Vertical or Horizontal, the relative position of the menu pop-outs, Border Colors, Styles and Widths.
- The **Customize Item Look** link allows you to set the look and feel of the menu items. This includes the ability to specify different effects when a user moves their mouse over the item. You can also set the Fonts, Borders and Padding attributes for your Menu Item.

Adding Menu Items

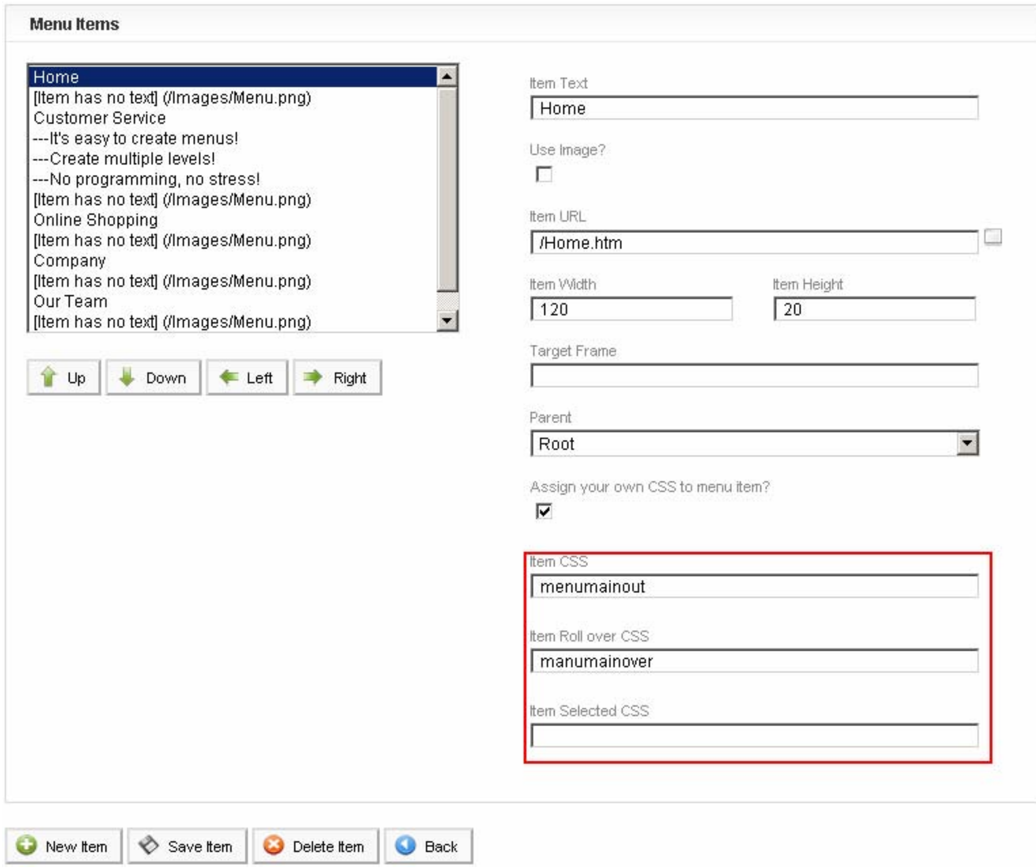
Every Dynamic Menu has Menu Items that control the navigation within a website. Menus have a Root Menu (top-level) and can also have sub-menus. Most websites have at least one level of sub-menus however you can have as many as you like.

Remember you can **view the instant help** on each input by hovering the mouse pointer over the input.

To add an item:

1. Click **Add/Edit menu items**
2. If you'd like to use an image for this item, check **Use Image?** And enter in an image as the default, the roll over image and the selected image.
3. Enter the **Item URL** to indicate where the menu item should point to. Click the small squares next to the textbox to open the **link manager**.
4. Set the **Item Width** and **Item Height** in pixels
5. Set the **Parent** menu item. If this is top level menu item, leave this as "Root". Otherwise, choose another menu item to allow the item to appear as a sub menu of another item.
6. Click **Save**
7. **Preview** your menu often to ensure it looks right!

For advanced users such as designers, you can actually set individual **CSS classes on individual menu items**. Click **Show Advanced Options** to access this feature and set CSS for the item and its rollover and selected states.



Note: You can customize the look of any menu item when it is selected. This can be achieved using a different image or CSS class for that menu item. This feature only works for top-level menu items. It cannot be used for sub-level menu items.

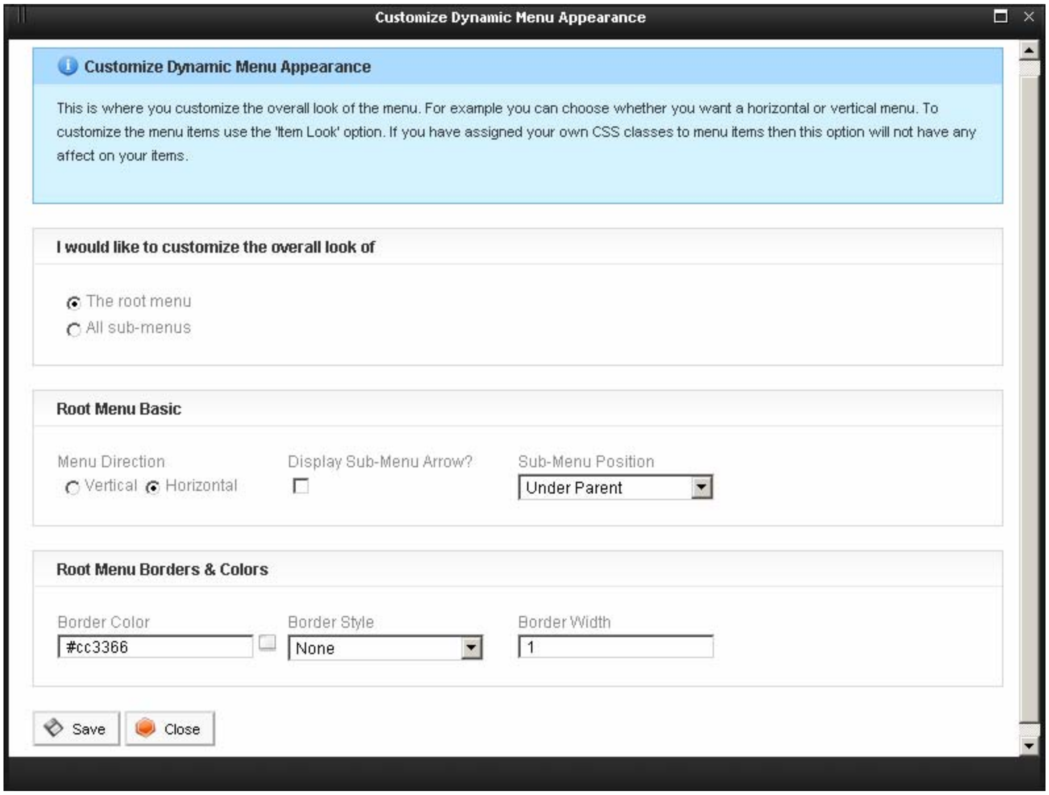
<u>Setting Menu Look</u>

Customize Menu Look controls the appearance of a menu which is a collection of items on the same-level. It is important to understand the difference between the **root menu** and **sub-menus.** A menu only has one **root menu** but can have many **sub-menus** that appear underneath the root.

For instance your menu may have top level items which are: Home, Products and Company. This is the root-level menu (has 3 items). Your *Products* menu item may have a sub-menu with menu items: *Product 1*, *Product 2* and *Product 3*. This is a sub-menu.

We highly recommend you use the Preview tab after each action to see how any customization changes impact the appearance of your menu. This approach will ensure you learn the ins and outs of the Dynamic Menus quickly.

The **Customize Menu Look** link allows you to set properties for the menu group, such as whether the menu should be horizontal or vertical, and border colors and widths

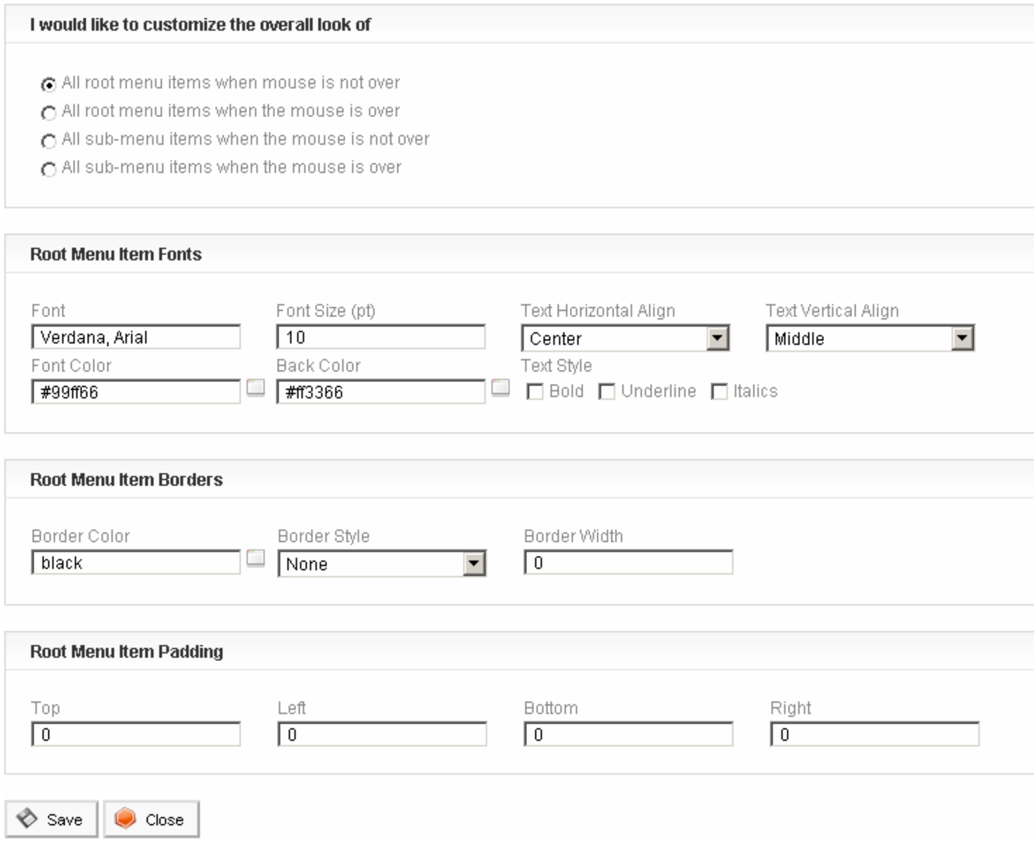


Setting Item Look

The **Customize Item look** link allows you to customize the appearance of the actual menu items.

- You can customize menu items on the root-level differently to all sub-menu items.
- You cannot customize two sub-menu items differently.
- You can customize mouse-over behaviors.
- Menus designed using Dynamic Menus can look as simple or sophisticated as you like.

You can set **Font** attributes for menu items, menu item **Borders** and **Padding** to control how much space is preserved around each menu item. Furthermore, you can do this for item mouse-overs, and for set separate styles for root items and sub menu items.



15.3. Inserting a Dynamic Menu

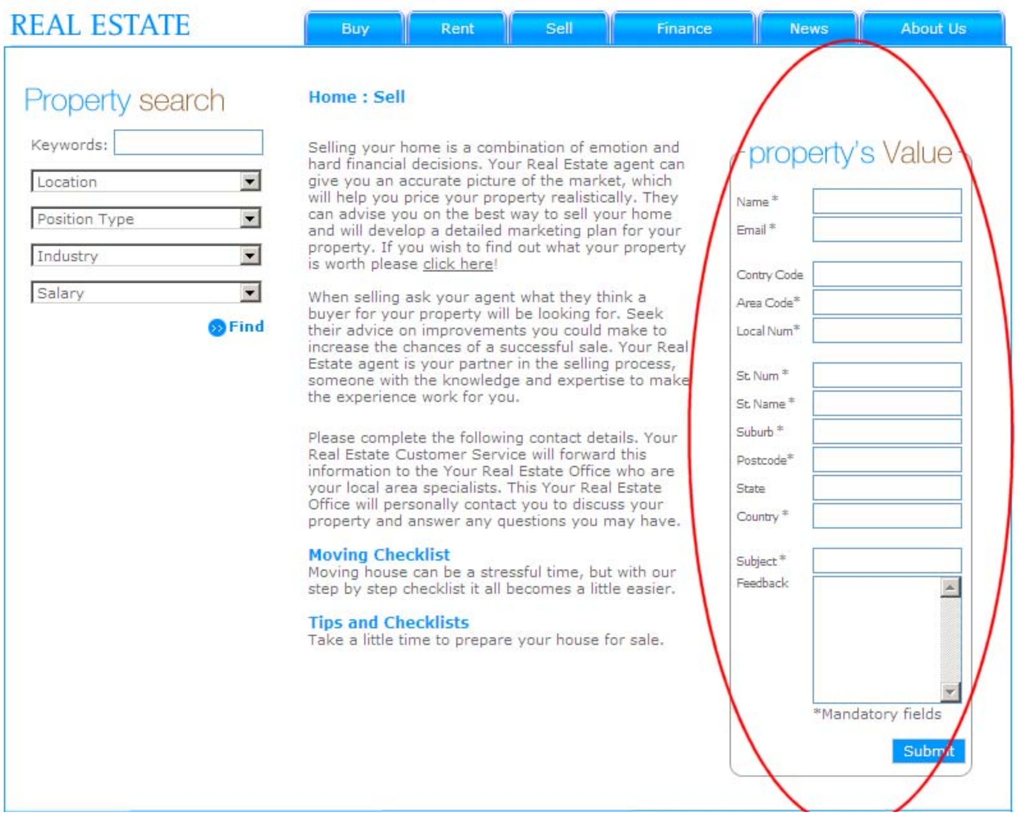
Inserting a Dynamic Menu can be done via **Add menu to a web page** link
.
Alternatively it can be added to a web page or template using the Module Manager.

Once you insert your Dynamic Menu on to your website, you don't need to re-insert again even if you make further changes to it. All your changes become instantly published on your website when you make any change to your menu.

16. WEB FORMS

16.1. Introduction

Web Forms are one of the most exciting parts of this solution. They allow you to interact with your customers, providing them with a communication channel to your business. You can use web forms to run competitions, create surveys, collect bookings, field enquiries, collect donations or register for access to specials. The possibilities are almost unlimited, and the best thing is that the customer's details will always be seamlessly captured into your **contact database** and a **case** created for each web form submission. Another advantage of web forms is that you don't need any technical knowledge to create them. Anyone can do it within minutes.

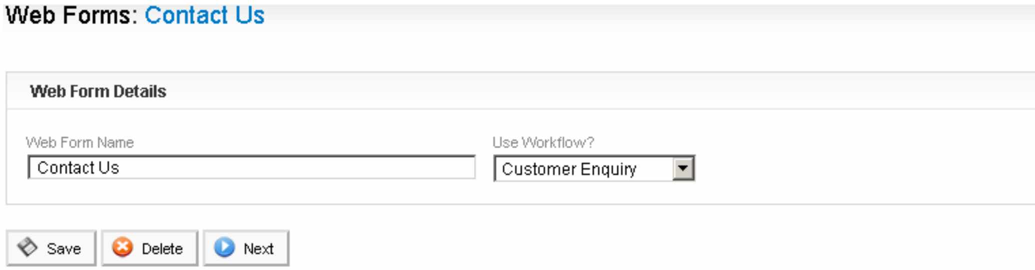


Web forms are capable of triggering a business process in your organization. This business process is called a **workflow**. Workflows can be used to:

- **Notify** sales people of an enquiry via SMS or email
- **Manage** customer expectations and service level agreements
- **Escalate** unresolved cases to management
- Request **Approval** to allow certain actions or events to go ahead.

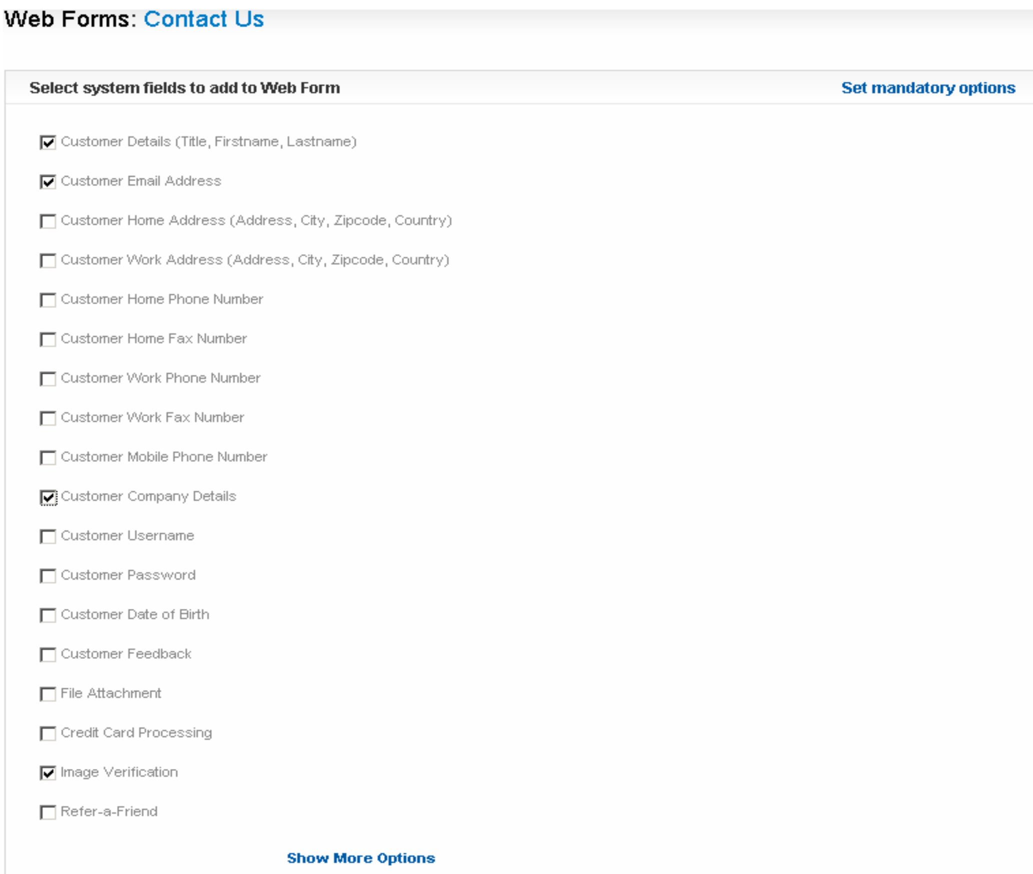
16.2. *Creating a Web Form*

To create a web form, go to **Modules -> Web Forms**. Click **Create a new Web Form** to get started. Enter a **Name** for your web form that describes its function. If you'd like to associate a business process to your web form, select the appropriate **Workflow** from the dropdown. Now click **Save**.

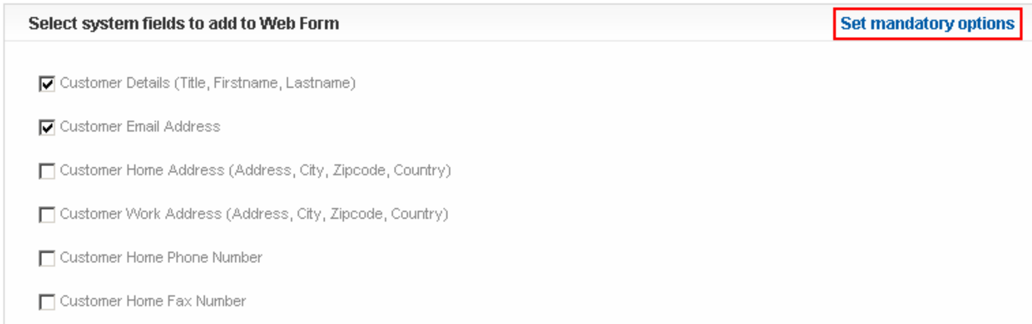


Adding System Forms

Forms are system-related fields that you add to a web form according to your business requirements. Simply check the check box of your desired forms, and they will be added to your web form. You can also select which **Campaign Newsletter Lists** your customers can subscribe to, and which secure zones the customer will be registered for (discussed in detail in a later topic). After selecting your required forms, click **Save**.



Note: All web forms must contain the Firstname/Lastname and Email Address fields. If you remove these from your web form, then customers can no longer use it. However of all other fields added to a Web Form you can elect which are mandatory and which are not.



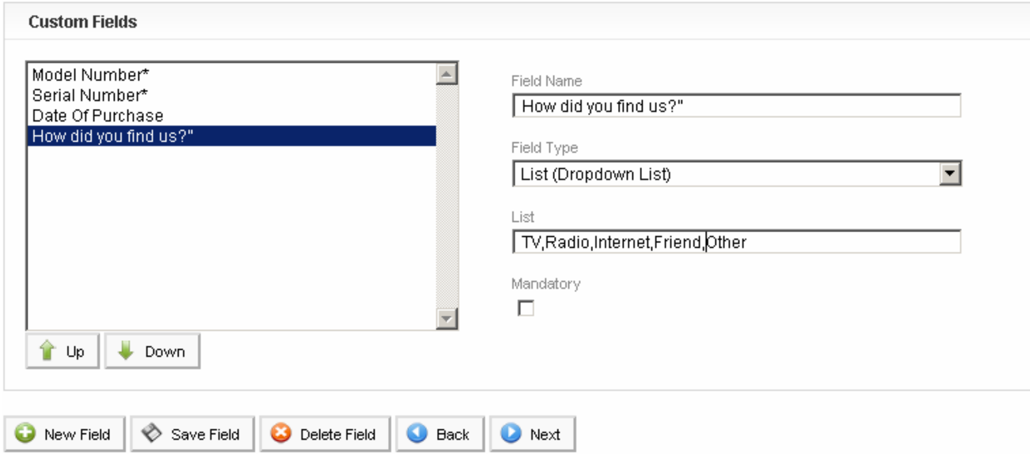
<u>Adding Custom Fields</u>

In addition to the system fields, you can also create custom fields to add to your web form. Custom fields allow you to customize your web forms to suit your business. There are almost no limits to how much you can customize your web form. This is a simple four step process.

1. Enter a field name. This will appear on the web form above the input field.
2. Select a field type. You can choose from several types, including:

    a. **Date**. For this field type, the customer will be presented a date picker to allow them to choose a date
    b. **Checkbox List.** The customer can choose from a list. They can choose multiple options from the list.
    c. **List box List.** The customer can choose from a list. They can choose multiple options from the list.
    d. **Dropdown List.** The customer can choose from a list. They can choose only one option from the list.
    e. **Radio List.** The customer can choose from a list. They can choose only one option from the list
    f. **Number.** A text box that must have a number entered in it
    g. **Text (Multi-line).** A text box that accepts multiple lines of text
    h. **Text (String).** A text box that accepts only one line of text
    i. **True/False.** A check box for yes/no answers.

3. **If a list was selected**, we enter in the options for that list, separated by **commas**. Put an asterisks (*) at the end of any value to make it selected.
4. Click **Add.**



Now repeat for each required custom field.

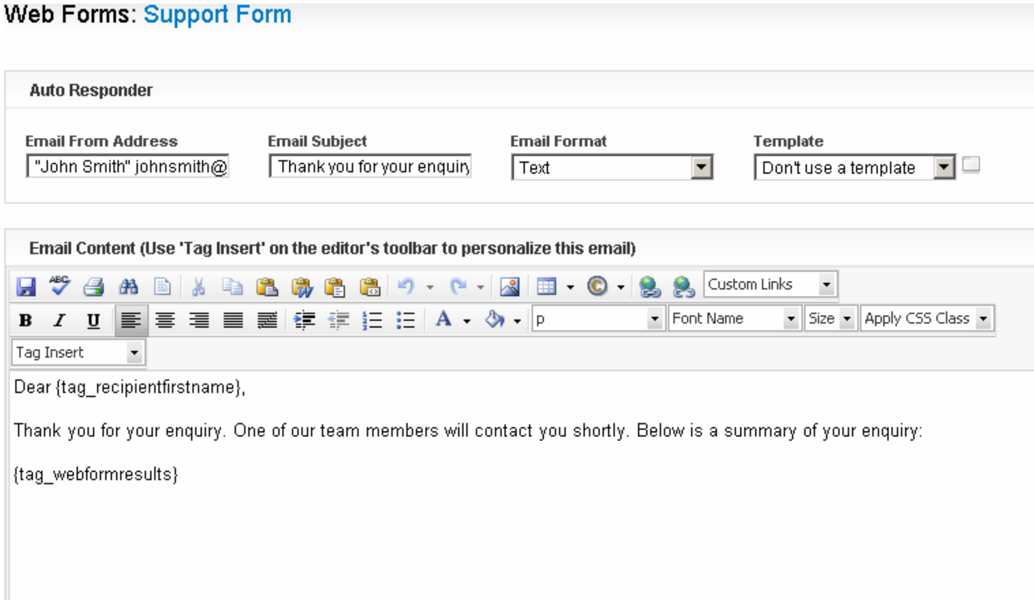
After creating fields, you cannot change their **type**; instead you must add a new field and potentially delete the old one. You can, however, change the items in a list if desired.

We strongly recommend you take advantage of the **Preview** tab to review your web form as you create it.

Creating an Auto Responder

Auto Responders are mandatory for every web form. They allow you to automatically send an email to the customer that submitted the web form., thanking them for their submission. You may want to include a message such as “Thank you for your submission, one of our team members will contact you shortly”. Under the Auto Respond tab you can set up the details of this email according to your needs, and click **Save**.

Refer to the Tag Manager on the WYSIWYG editor’s toolbar for a list of tags that allow you to personalize this email for every customer. You can include the customer’s web form submission in your email by adding the tag **{tag_webformresults}**.

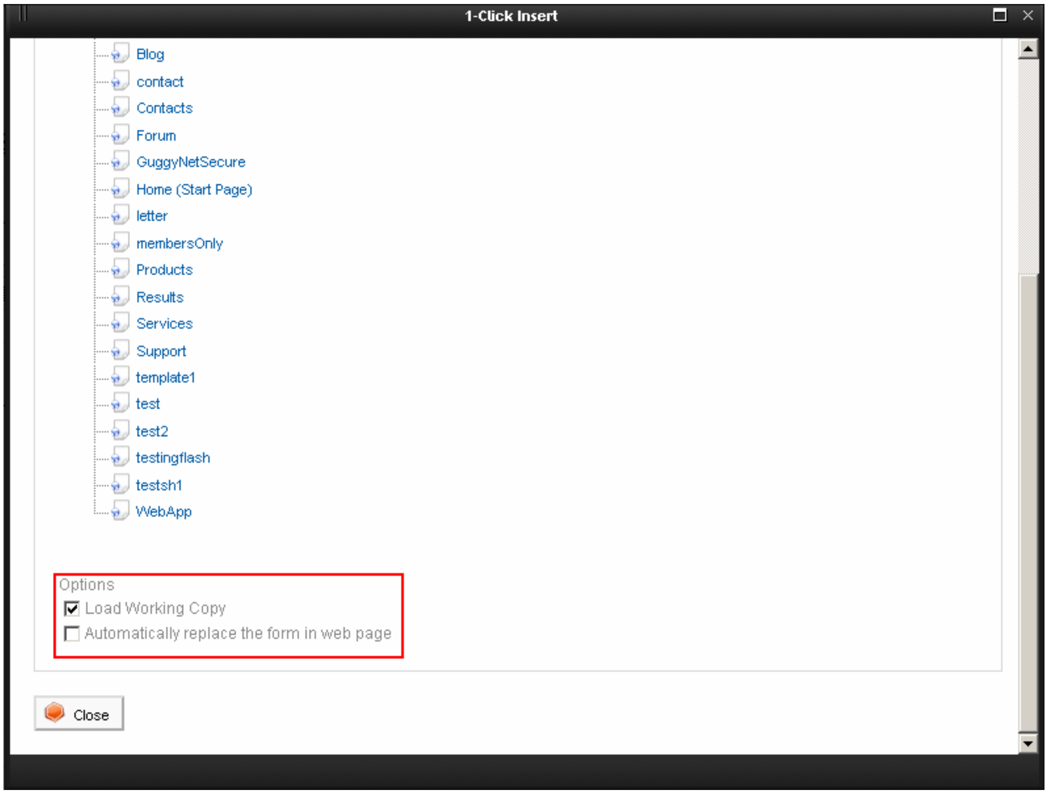


<u>Inserting your Web Form on a web page</u>

It is important to remember that you **must re-insert your web form after making any changes to it**. This is because when you insert a web form, you are effectively copying the form into the web page. This has three consequences:

- The web form can be completely customized in each page that it is in
- Any changes to the web form made in the web page do not affect the original
- Any changes to the original web form do not affect the copies of that web form in your web pages.

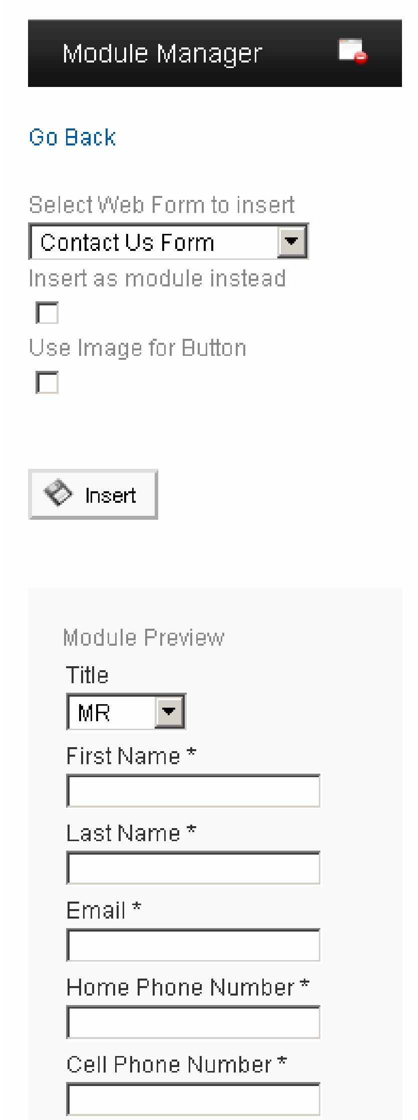
Web forms can be inserted via two methods, by clicking **Add Web Form to a web page** or the **Module Manager**.
Web forms can be inserted after creation or modification by clicking on Add Web Form to a web page link.
Select the **web page** you want to insert the form on. If you are replacing an existing form in the page, you can select to **automatically replace** the existing web form option.



Click the 1-Click insert drop down list to insert the web form. **If you selected to auto-replace, the old form will already be replaced and there is no need to insert it again,** review the system message to see if the automatic replacement was successful or not.

You can customize the form as you require once it has been inserted. This means you can re-arrange the fields, add your own style sheet classes to each field and so forth. Click **Save & Publish** when you're finished

Alternatively you can use the **Module Manager** to insert the form. This is done in the WYSIWYG editor or Triangle. Select Web Forms and then choose your web form.



HTML Code

Web forms can be placed on any web site, not just those hosted with Your Online Business. You can copy and paste the HTML code by clicking on **Get Web Form HTML Code** and insert it on any page. When the customer submits the form, the customer details will still be stored in your contact database.

You can even customize to have the form redirect back to your website hosted elsewhere. Under the HTML Code, you will see another box where you can enter the URL for the confirmation page to display after the web form has been submitted by a customer.

Customizing your Web Forms

Web forms can be completely customized. Web forms are customized after they are inserted on a web page. You can then customize it by editing the HTML code, adding CSS classes or replacing buttons with images. You can also re-arrange the fields. Any customizations you make will only affect the copy of the web form on the page.

Note: It's important that you test the web form after making changes to it by making a few submissions through it. This ensures that whilst customizing the web form you have not broken the form.

If you make changes to your web form via Modules -> Web Forms then you must re-insert your web form on any web page where the web form was previously placed.

16.3. Advanced Topics and Techniques

How Web Forms affect Customer Information

It's important to understand how web form submissions by customers affect the information stored in your customer database. Customers are always identified by their email address, this is the unique identifier.

There are two important assumptions the system makes:

- No two contacts can ever share the same email address. However a contact and a company can share the same email address.
- Only contacts ever interact with you via your website. So when a customer submits a form, buys online, subscribes to a newsletter, it's always considered that it's a contact doing so and never a company, companies are not people.

Imagine a scenario where an existing customer with an existing home address in your customer database submits a web form. This web form also contains home address fields. In this case, the customer's home address is not updated. In fact none of the system forms are ever updated. This is a security precaution to ensure random people do not update other people's details by a way of using other people's email addresses to submit forms.

However a new case is created with each submission and any custom fields that you have created will be captured and attached to the new case.

Collecting Customer State / County

When you add an address field to a web form, by default the state / country field is not included. You can manually include this.

- Home State - <input type=text name="HomeState">
- Work State - <input type=text name="WorkState">

Username and Password

By including the username/password options in a web form, you can enable customers to register for a new username and password. Username and passwords allow customers to log in to Secure Zones.

Usernames are unique across all contacts. That means no two contacts can share the same username and password. When a web form submission is made:

- If the customer's record already has a username and a password, then the username/password entered in the web form is ignored. The existing username and password details are automatically emailed to the email address on the customer's record.
- If the username entered already belongs to another customer then the current customer is notified. The customer can make corrections and resubmit the web form. Each submission creates a new case.

Note: If you want to make the customer's email address their username then you will need to make some slight changes to your web form. In the system the username and the email address fields are different. And for the customer to use their email address to login, their email address must also be stored in the Username field.

You can customize a web form to automatically populate the username fields with the customer's email address. To do so follow these steps:

- Insert your web form on to a web page
- Hide (not remove) the username field. You can do this by wrapping it in a HTML div element which is hidden.

e.g. <div style="display:none;">Username
<input type=text name="Username" ></div>

- Make the email address field automatically update the Username field when an email address is entered.

e.g. <input type=text name="EmailAddress" onChange="document.getElementById('Username').value=this.value;">

Multi-Step Forms

Multi-step forms are related forms that span across a number of consecutive web pages. Creating multi-step forms is relatively easy. One of the main benefits of the multi-step forms built into this system is your ability to attach all the related forms that a customer fills in across different web pages to the same case.

Imagine if you are a loans company, you can easily create your loan application with a series of web forms that seamlessly navigate the customer from one to another.

To create a multi-step form:

- Create all the web forms, each relating to a step in your multi-step form
- Create a web page for each step of the web form and place the relevant web form on it
- Refer to the later topic on **Customizing the Confirmation Message** for web forms. Starting from the second step of the web form, open up the relevant web page and point the web form to go to step 3 of the web form and so forth.
- The system takes care of everything else. If you configure each step of the web form to move to the next step then all the steps will be linked together and captured in one case for every customer who goes through the steps. If a customer stops half-way then all steps up to that point will be captured.

Note: If you configure a workflow process for a multi-step web form, then you will be notified after the first step of the web form has been completed. The workflow will contain information for the first step only. To view the entire submission please log into the web-based Administration interface.

If you are using the Reports to report on cases, then each step of a multi-step web form needs to be reported on separately. You cannot create a report consisting of all the steps of the web form submission. However each you can report on each step and easily export to Microsoft Excel where the information can be merged.

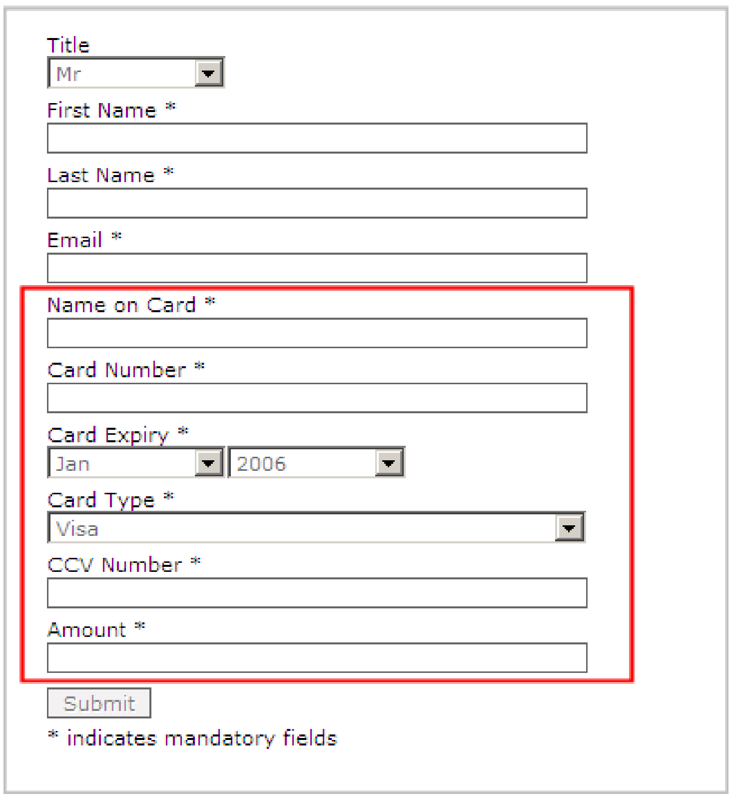
You can implement your own conditional branching where based on a particular value in one step of the web form you can skip a step or jump forward to another step. You have complete control over which steps you wish to skip or include. As long as when a customer moves from web page to web page, there is a web form on each web page these will be linked together in one case. Use JavaScript to implement your branching requirements.

Credit Card Processing

The web forms feature can process credit card details in real-time. This feature is extremely useful; how you use it is entirely up to you, for example you can:

- Collect and process donations
- Collect payments for paid events / bookings

When you add the credit card processing option to a web form it will include the following fields:



If the form is to charge customers a predetermined field, then enter the amount in the **Amount** field and make the field read-only.

e.g. <input type=text name=”Amount” readonly value=100>

If you are processing a payment for a booking and require to automatically calculate the total cost depending on the number of tickets purchased then:

<input type=text name=”BookingAllocation”
onChange=”document.getElementById(‘Amount’).value=this.value*100;”>

This example will multiply the number of tickets sought by $100 and will automatically populate the Amount field.

Note: There are a number of considerations when using this option.

1. You cannot use a non-seamless payment gateway such as PayPal to process credit cards on Web Forms. PayPal and other non-seamless payment gateways can only be used in the online shop.

2. The payment gateway used to process the payment will be based on the country associated with the current URL. That is if the current URL that the customer is using is www.yourcomany.com and this URL is associated with USA, then the payment gateway you have assigned to USA will be used to process the payment. You can override this by passing in your own country-code rather rely on the system to use the current URLs country-code.

   To do this you need to append the following to your web form's action URL:

   Action="/FormProcessv2.aspx?......."

   To use the payment gateway associated with Australia append &CC=AU

   Action="/FormProcessv2.aspx?.......&CC=AU"

3. When linking to a web form that processes credit card details, you should use the https:// secure URL (SSL) provided to you. This ensures the entire transaction is secure. To find out what the secure URL for your website is, go to: **Admin -> Manage Domain Name** and click to see **System URLS**. If you choose to use the secure URL then you may need to also implement option (2) above as the country-code associated with the secure URL may not be suitable for all customers.

File Attachments

You can easily collect documents from customers via web forms. Imagine if you are a printing company, you can have customers upload their art work. As an accountant, you can have your customers upload their financials when they contact you. Including the file attachment option is a matter of selecting the **File Attachment** option in the Forms tab. Files uploaded during the web form submission are automatically attached to the case created. File attachment limit is set to 20Mb (previously 10Mb).

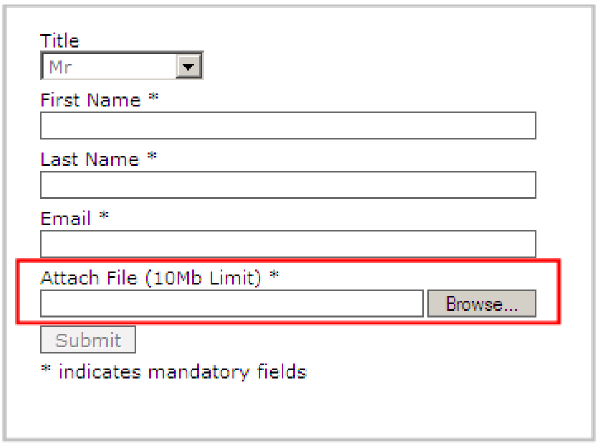
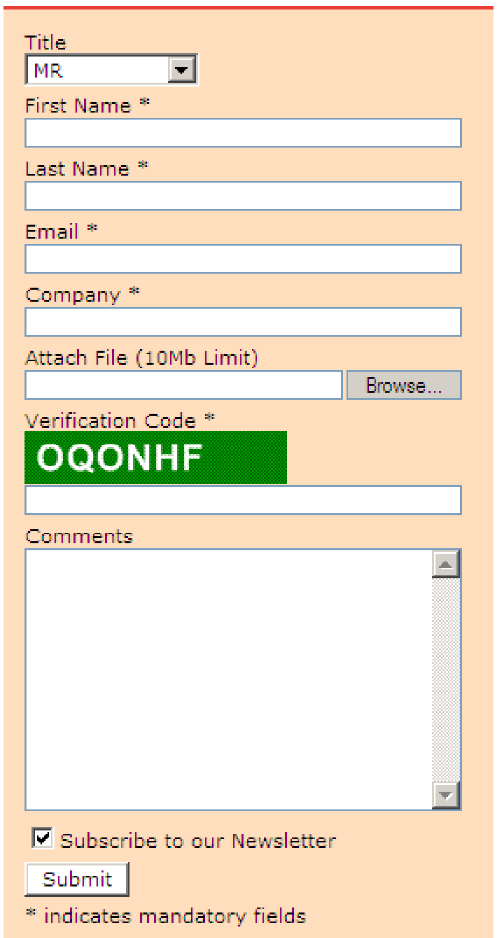


Image Verification (Captcha)

Automatic web bots are becoming a serious nuisance to website owners. These bots are automatically submitting web forms with it sending unsolicited content. This is a new form of spam. You can use the **Image Verification** feature, also referred to as Captcha to address this issue.

When this feature is enabled for a web form, customers must enter a series of letters generated as an image into a textbox. If this is entered correctly then the web form submission is accepted. Fortunately web bots are unable to read images and make sense of the letters and hence cannot type them correctly in the textbox provided.



Note: You can configure the color of the Captcha image. After inserting the web form onto your web page, go to the source of your web form and locate:

Change this to:

All internet supported color names are supported.

Subscribing to a Secure Zone

There are times when you want customers to register their details before downloading a document or accessing other forms of content. The **Subscribe to Secure Zone** option allows you to do this easily.

You can as part of your web form, automatically subscribed the submitting customers to a secure zone. When a customer is subscribed to a secure zone they can access any content that is also within that secure zone.
It's up to you whether you want to include the username/password fields to this web form. You can keep your web form more simple by leaving out this option and have the customer fill it in each time they want to access your secure content.

Note: If you include this option as part of your web form then the customer is automatically taken to the landing page of the secure zone after their submission. Any other landing page that you may have configured for the web form is ignored.

Collecting Anniversary Dates

For each customer you can store up to 5 anniversary dates. These dates are used for loyalty email campaigns. Refer to an earlier section for more details. To capture this information, include the following your web form:

```
<input name="Anniversary1" id="Anniversary1" readonly
onfocus="displayDatePicker('Anniversary1);return false;">
```

You can also replicate the above for anniversaries 2 to 5, e.g. Anniversary2, Anniversary3 and so forth.

Customizing the Confirmation Message

By default a system message is displayed every time a web form is submitted. You can customize this message via **Admin -> More Customization Options -> System Messages**.

You can also configure your web form to go directly to a web page that you designate. This web page can be hosted with entirely on this online business platform or on a 3rd party hosting provider.

To do this you need to append the following to your web form's action URL:

e.g.

action="/FormProcessv2.aspx?........"

change to:

action="/FormProcessv2.aspx?........&PageID=/Results.htm"

You can also use JavaScript to conditionally set the confirmation web page of a web form. For example if a customer is choosing their City, then if the customer choose LA then you can redirect to the LA landing page and for San Francisco you can redirect to the San Francisco landing page. Refer to the Support Forums for examples of this.

Allowing customer to update their details

The Update Details form allows your customers to securely update their details via a Secure Zone. To use this feature add the **Update Details** form to any secure web page using the Module Manager or Triangle.

After a customer successfully logs in to a Secure Zone and accesses the web page that contains this web form they will see the Update Details form pre-populated with all their personal details. Customers are able to make changes to this form and select Save to update their details in your customer database.

Pre-Populating Web Form Fields

When you insert a Web Form onto any web page that is secure, you are able to pre-populate some of the fields. When a customer fills in the form, fields such as first name, last name, email address and so forth will be pre-populated. To enable this feature, simply add your web form to any secure web page and set the value for the following fields with the following modules { module_firstname }, { module_lastname }, { module_emailaddress } and { module_company }, e.g.:

<input type="text" name="FirstName" value="{ module_firstname }" />

Launching different workflows depending on enquiry type

Every web form you created can be configured to use a workflow. A workflow is a business process that is launched when the web form is submitted. For example if you are a Cleaning Company and a customer fills in your “Get-a-Quote” web form, you may want to notify the service department via SMS and Email, and also notify management by email. You may also want to escalate this to management should the enquiry not be completed in a timely manner. This is a typical workflow that you would attach to this web form. Keep in mind that workflows are completely customizable.

Now imagine the same cleaning company growing to great heights where now they have 100’s of franchisees. It becomes unrealistic for all enquiries made from the same “Get-a-Quote” web form to be sent to the service department at the head office. It makes much more sense to send enquiries to the relevant franchisees depending on where the customer is located and which franchisee services that location.

Implementing this type of functionality is relatively easy and will significantly improve the way your business operates. To get started:

- Create a number of Workflows via Administration->Workflows. Each workflow should notify the relevant staff at each franchisee. Each workflow may also include a step to notify the head office.
- Write down the system ID of each workflow (this is displayed in the blue bar when creating or editing a workflow)
- Go to the web page that contains a web form that you wish to implement this functionality for
- View the source of the web form and add the following code to your web form:

```
< select name="WorkflowList" >
< option value=ID1 >Workflow 1 Name< /option >
< option value=ID2 >Workflow 2 Name< /option >
< option value=ID3 >Workflow 3 Name< /option >
< /select >
```

In this example you would replace “Workflow 1 Name” and alike to the locations services by franchisees. ID1 through to ID3 must be replaced with the system ID that you collected earlier.

e.g.

```
< select name="WorkflowList" >
< option value=123>City Center< /option >
< option value=124 >City North< /option >
< option value=125 >City South< /option >
< /select >
```

In the above implementation when a customer fills in a web form, they will also be presented with a drop down that will ask them to choose where they are located. When the web form is submitted depending on the location the customer chose, the relevant workflow will be launched. This will only notify the franchisee that services that location.

Creating a simple Web Form to Email page

Some of the basic plans in this system do not offer the integrated customer database nor the web form features. However it is imperative for all websites to enable customers to enquire online where those enquiries are handled in a timely manner.

You can create simple web form to email functionality where the details of a web form submissions are emailed to a pre-designated email address.

To enable this functionality:

1. Create your web form using your existing web design software, e.g. Dreamweaver or FrontPage
2. Insert your web form on to any web page
3. Change the action URL of the form to:

Action="/Default.aspx?A=Form&Email=You@YourDomain.com&PageID=/Destinatio Page.htm"

Replace "You@YourDomain.com" with your email address & replace "/DestinationPage.htm" with the URL of the destination web page to display after the web form has been submitted.

With the above functionality every time a web form is submitted its details will be emailed to you. Things to keep in mind with this feature are:

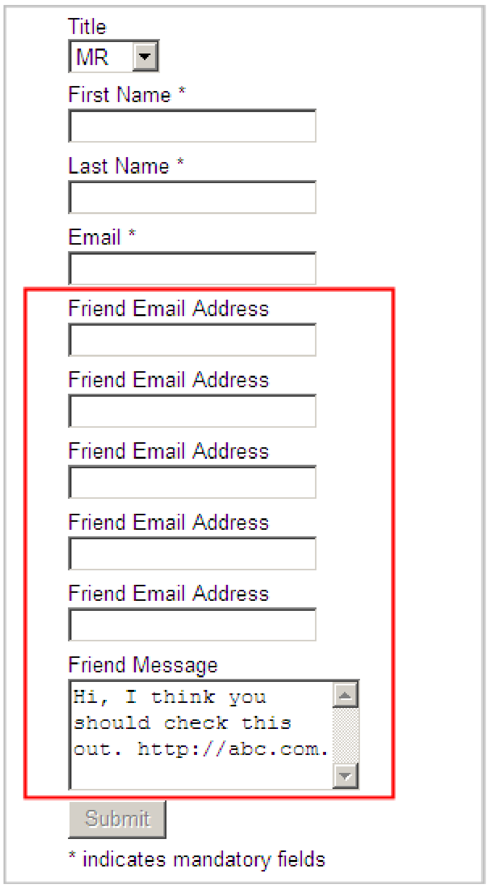
- Customer details do not get captured in the customer database. Upgrade to a higher plan to take advantage of this
- Web form submissions do not get captured in the customer database as cases. Upgrade to a higher plan to take advantage of this
- Only one person
- Only one person can receive the details of the web form via email only. SMS notifications cannot be sent
- The details of the web form submission cannot be emailed or displayed to the customer making the submission

Incorporating Refer-A-Friend in your Web Form

The refer-a-friend option comes as a stand-alone module and would normally be used in such a fashion, i.e. not within a web form. However from time to time you may want to include this functionality inside your web forms. This allows customers to submit an enquiry and refer friends at the same time using the one web form.

To add this functionality to any web page simply select this option from the “Forms” tab in Modules -> Web Forms.

To customize the default message that is sent out when a referral is made, simply insert the web form onto any web page and then customize the message that appears in the **Friend Message** field.



17. ANNOUNCEMENTS, FAQS, LITERATURE

17.1. Announcements

You can quickly and easily publish Announcements, News Stories, Press Releases, Calendar Events or even Employment Advertisements using Announcements. When announcements are created and added to your web page, your customers will see the announcement title and a release date on your site.

Benefits of Announcements

Announcements allow you to quickly and easily maintain a list of newsworthy events that helps you keep your site fresh and communicate important messages with your customers. When Announcements are viewed by a web site visitor, a record is made of the action. This means that you can now accurately track what events and news stories are being viewed, how often and so forth.

Adding Announcements

To create Announcements go to **Modules -> Announcements**, and follow these steps:

1. Click **Create a new Announcement**
2. Enter Announcement Details (**Details** tab)
    a. **Role responsible** (**show more options** link) will notify the selected role if the item has an expiry date
3. Author the **Announcement Content** (Editor)
4. **Classify** the Announcement if it is required. (**Classify this Announcement** link)
5. Add the Announcement to a **Secure Zone** if it is required. (**Make Announcement secure** link)
6. Add the Announcement to an **RSS Channel** if it is required. (Add to an **RSS Channel** link)
7. **Preview** the Announcement if desired (**Preview in new browser** link)

15-Dec-2005	Q&A: Microsoft Expands Reach of Volume Licensing Programs and Reduces Complexity
20-Nov-2005	Microsoft's Approach to Serving Industries Expands Opportunity for Software and Services Partners
06-Oct-2005	Q&A: Microsoft Makes Opportunities Real for Worldwide Network of Industry Partners
03-Sep-2005	Q&A: Microsoft, Rusk Institute Hold Forum on Benefits of Accessible Technology
08-Aug-2005	Microsoft Appoints Kevin Turner as Chief Operating Officer
29-Jul-2005	Microsoft Research Faculty Summit Inspires Fresh Approaches to Challenges and Concerns in Academia a
01-Jun-2005	Casual Gaming Gets Serious
31-May-2005	Q&A: Microsoft Announces Plans to Acquire FrontBridge Technologies, Inc., a Leading Provider of Secu
11-Apr-2005	Microsoft Reports Strong Revenue Growth
16-Mar-2005	Microsoft Accessibility Resource Centers Empower People with Disabilities
01-Feb-2005	Ballmer Touts Microsoft's Innovation Investments and Strong Growth at Annual Financial Analyst Meeti
13-Jan-2005	Participants Praise Content and Interactivity of Microsoft Office Live Meeting Leadership Forum Seri

17.2. FAQs

FAQs or frequently asked questions are an effective way to improve customer experience and reduce customer related enquiries. FAQs allow your customers to self-serve themselves by getting answers to their questions on your website without having to contact you.

FAQ Benefits

Your service and support facilities can be transformed into a far more powerful and effective force. Now it's possible to deploy a complete self-service management solution on your Web Site. You start by creating a rich and powerful FAQ knowledgebase that relates to your business and your issues. These FAQs can be made available on one or several areas of your website. Customers use FAQs to get detailed answers to questions. If they cannot locate the answer they may escalate a question to your service staff.

A reusable FAQ or issues knowledgebase can be created extremely quickly. With this customers will be happier and you can spend more time on servicing your high-value issues - reducing call and email volumes. Stop your customers and even your staff asking the same questions while reducing your support load.

There are two ways to display FAQs on your website.

The most common way is a series of questions that link to the relevant answers.

1. Can I get price comparison information on my mobile phone to improve my in-store bargain hunting?
2. Froogle? What kind of name is that anyway? And who's "Beta"?
3. How do I buy something from Froogle?
4. How do I search for products within a particular category?
5. How does Froogle compare with other sites?
6. How does Froogle do what it does?
7. I don't see my favorite lemur supply store on Froogle. Can you add it?
8. I know a great website that rates stores or products. How do I get it added to Froogle?
9. I sell prosimian supplies online. How do I get them included in Froogle?
10. I want more control over my results. Would you move over so I can drive?
11. I work for a ratings site whose data appears on Froogle. We have some questions regarding our content and Froogle.
12. Is my Froogle Shopping List private?
13. What are Froogle Store Ratings and Product Reviews?
14. What are the "Sponsored Links" on the right side of the page?
15. What is Froogle Shopping List?
16. Why are my results separated into two groups?
17. You know what Froogle should do? Let me tell you. Whom do I email?

Another way is to add the customer self-service FAQ feature to your website. This implementation allows customers to browse FAQs, filter by the category the FAQ relates to and even search. The most popular FAQs are listed first followed by the least popular FAQs.

Category: -- All Categories -- | Search (optional): [ ] Search | Sort By: Popularity

Search: [Viewing All FAQs] Page: [1] Next

	Frequently Asked Question	Category
1	How do I find everything the Prosimian Times wrote about Gentle Lemurs in the last month?	Google News
2	Can I have multiple AdWords accounts?	About AdWords
3	How do you decide what stories are published on the Google News home page?	Google News
4	How does your grouping technology work?	Google News
5	How far back does Google News go?	Google News
6	Is there a minimum required clickthrough rate?	About AdWords
7	My keyword has a high CTR. Why was it disabled?	Improving my account's performance
8	What are the "Sponsored Links" on the right side of the page?	Froogle General
9	What if I am automatically logged out of my account?	My AdWords how-to guide
10	Can I review my new Jumpstart campaign prior to serving ads?	Jumpstart
11	How can I move keywords from on hold to in trial status?	Improving my account's performance
12	How do I manage the number of keywords in my account?	Improving my account's performance
13	What are the Editorial Guidelines?	Setting up my account
14	I want more control over my results. Would you move over so I can drive?	Froogle General
15	How do I get my products in Froogle?	Multiple

Adding FAQs

To create FAQs go to **Modules -> FAQs**, and follow these steps:

1. Click **Create a new FAQ**
2. Enter FAQ Details (**Details** tab)
   a. Enter FAQ question
   b. Enter a **weighting** to control the order that FAQs are listed in. The highest weighting will appear at the top
   c. **Role responsible** (show more options link) will notify the selected role if the item expires
5. Author the **FAQ Answer** (**Editor**)
6. **Classify** the FAQ if it is required
7. Add the FAQ to a **Secure Zone** if it is required.
8. Add the FAQ to an **RSS Channel** if it is required.
9. **Preview** the FAQ if desired

17.3. Literature

You can set up and maintain a powerful Literature library and publish that Literature to your website. Customers see the filename and file type icon, with a link to download the file. Literature is a term used for any documents, files or even executable program files that can be placed on your website for download by your website visitors.

Literature Benefits

Literature is an extremely powerful tool for **instant publishing of downloadable web content**. Your online business can very quickly develop a literature library for access by website visitors. When Literature is downloaded by a website visitor, a record is made of the action. This means that you can now **accurately track when literature is being viewed**, how often and so forth.

Reporting features provide instant feedback about what customers are downloading. This helps you refine your content to update poorly performing items or create more of what customers want. Having better information at your fingertips helps you make instant decisions about improving your business.

Adding Literature

To create literature you must first author a document or file in its native format - such as Microsoft Word or PDF. Once you have the document in the format that you would like to be uploaded, go to **Modules -> Literature**

1. Click **Create a new Literature item**
2. Enter Literature Details in the **Details** tab. Note that:
   a. **Role responsible** (advanced option) will notify the selected role if the item expires
3. Click **Save**
4. Click **Upload Literature** to upload the file
5. **Classify this Literature if** it is Add the Literature to a Secure Zone if it is required.
6. Add the Literature to an **RSS Channel** if it is required. (**Syndicate and share using RSS**)
7. **Preview** the Literature if desired

Note: You may decide not to use the Literature feature and upload or FTP your documents directly to your website. If you use this approach then you will need to manually create links to these documents. Also no usage tracking is available for these documents when Literature module is not used.

The Literature module does not support streaming. This affects file types such as Windows Media or Streaming Flash. If you use the Literature module for these file types then the visitor will be forced to download the entire file before they can view it. For these file types it is better to upload or FTP them directly to your website and link to them from your web pages.

17.4. Classifying Announcements, FAQs, Literature

All of these items may be assigned to one or more categories. When you classify items in categories you **make it easy to publish them on web pages**, by allowing you to group related items together. Here is how classification works:

Imagine you are a financial advisory business which has a wide range of content relating to educating individuals on Tax matters as well as Superannuation matters.

You can assign the tax related documents, FAQs and announcements under the **tax** category and the superannuation related items under the **superannuation** category. Assign a classification under the classifications tab, by moving your desired classifications from left to right.

By classifying items you **can publish groups of them** at once on any web page. As you add more items related to superannuation they will **automatically appear** on your website without any further editing of web pages required.

Note: You can manage your category list and create new categories that are relevant to your business. This is done under Admin -> Manage Categories.

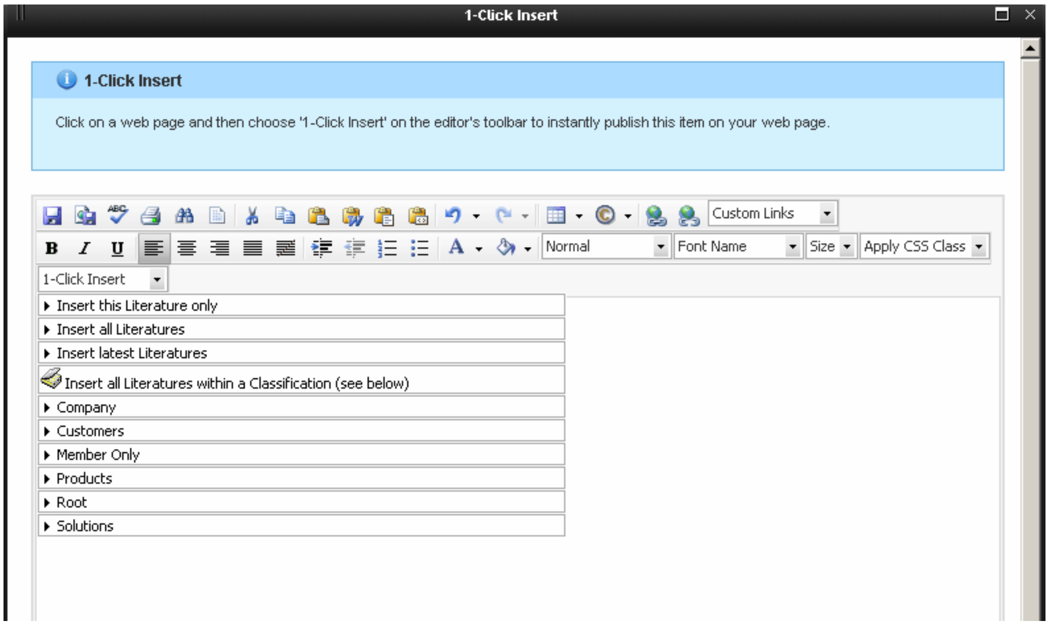
17.5. Making Announcements, FAQs, Literature Secure

All these items may be added to one or more Secure Zones. By adding an item to a Secure Zone, you **restrict access to it to members of the Secure Zone**. Website Visitors will not be able to access the item via a link or by their web site search.

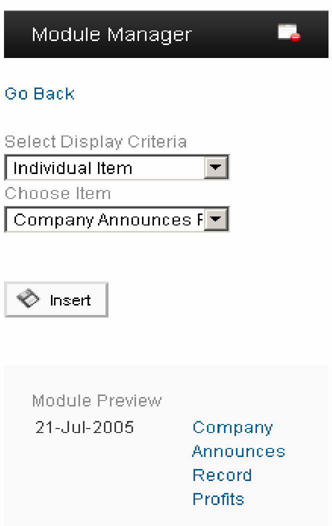
Note: When using the search engine, if an item matches a query it is displayed, regardless of whether the item is secure or not. However when a secure item is selected only visitors currently logged in to the secure zones will be able to view the details of the item.

17.6. Inserting Announcements, FAQs, Literature on web pages

All of these items can be inserted on a page via the **1-Click Insert** tab when viewing or editing the item itself. **1-Click Insert** will give you the option to insert just one item, all items within a category or all of the items.



Alternatively you can insert items on a page via the **Module Manager** in the WYSIWYG editor or using Triangle. Again, you are able to choose to only insert one item, all items within a category or all of the items.



17.7. Adding Announcements, FAQs, Literature to RSS Channels

You can syndicate all of these items and share them with the world by adding them to an **RSS channel**. By adding an item to an RSS channel, subscribers to that channel will be able to see and be able to read the item you just added, almost instantly.

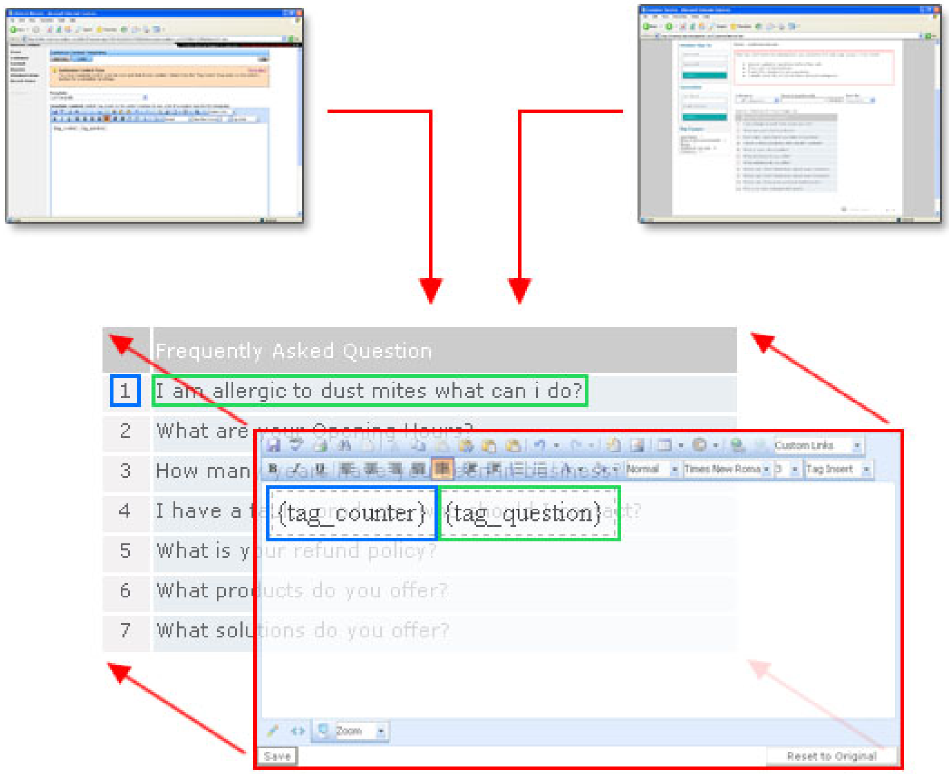
17.8. Customizing Announcements, FAQs, Literature

When you display Announcements, FAQs or Literature on a web page you can customize the entire layout to suit your needs. These types of content use two templates that you can use to customize their appearance. These templates are generally customized up-front and require no further maintenance.

All customization of these templates can be done under **Admin -> More Customization Options**, then "Announcement, FAQs or Literature Templates". You can equally use Triangle to customize these templates.

The List Template

The List template defines how a group of FAQs are displayed on a web page. For instance if you have a number of FAQs you may want to create a web page and display all of the FAQs on it. The list template controls how the list of FAQs are displayed together on a web page.



You may move each tag to the position you desire, and add new tags via the tag manager or tag list.

For example imagine a list of FAQs that appears on a web page:

> FAQ Question #1
> FAQ Answer #1
>
> FAQ Question #2
> FAQ Answer #2
> …
> …

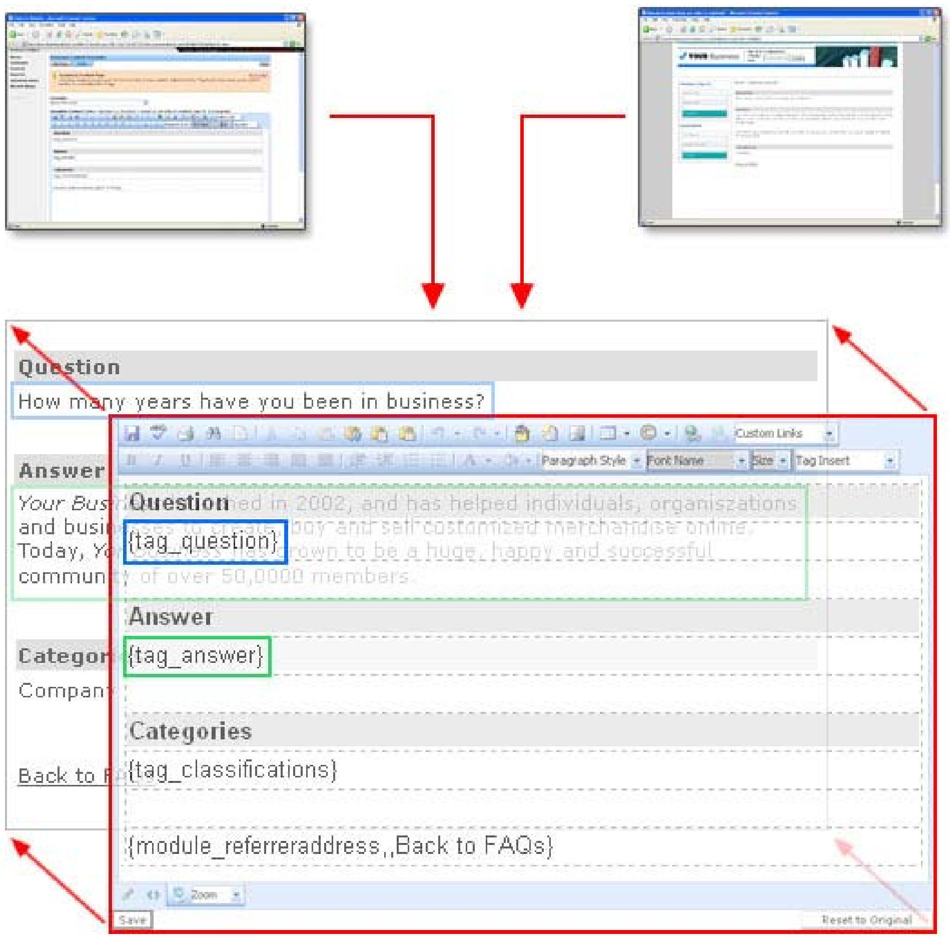
Each FAQ is effectively made up of tags and some HTML. This means you can write your own HTML and applying your own CSS classes to make sure your FAQs have the exact look and feel that you desire. For example:

<div class=faqquestion>{tag_question}</div>
<div style=”padding-top:10px;” class=faqanswer>{tag_answer}</div>

So when we display a list of FAQs on a web page, every FAQ will be laid out according to the above template. Each content type has many tags that you can use when customizing the layout of your content.

The Details Template

Details template defines how the details of an FAQ is displayed after it has been selected. In this instance once a customer chooses one of the FAQs it is loaded and displayed exactly how you have setup your Details template.



The appearance of these types of content is entirely customizable. Layout, style sheets, colors and the information that is displayed is controlled and positioned as you want it, via the use of tags and the tag list.

Please note that Literature does not use a Details template as when a literature is selected the download dialog is displayed.

17.9. Advanced Topics and Techniques

After adding the Announcement or FAQ module to a web page, you can make changes to it to slightly alter its behavior. Normally the module would look like:

{ module_faq, filter, id, noTemplate, effect t, targetFrame}

- filter – system generated (do not change)
- id – system generated (do not change)
- noTemplate – if you want to force the item not to use a site-level template when displayed pass in true, otherwise leave empty
- effect – Enter ajax if you want to take advantage of the latest web technologies for a better customer experience
- targetFrame – the frame in which to open the item in

e.g.

{ module_faq, filter, id, , ajax }

Note: The Literature module has a limited number of parameters due to its nature, e.g.:

{ module_literature, filter, id, targetFrame}

18. TRIANGLE – THE DREAMWEAVER PLUG-IN

Triangle empowers web designers to build richer and more advanced websites without coding and with less stress and less work directly inside Dreamweaver. Triangle is the third tool in the ultimate toolkit a designer can have after Photoshop and Dreamweaver. It enables web designers to manage all their websites including the ability to add and update web pages and templates. It empowers them to add next generation business functionality using a point and click approach all from inside Dreamweaver.

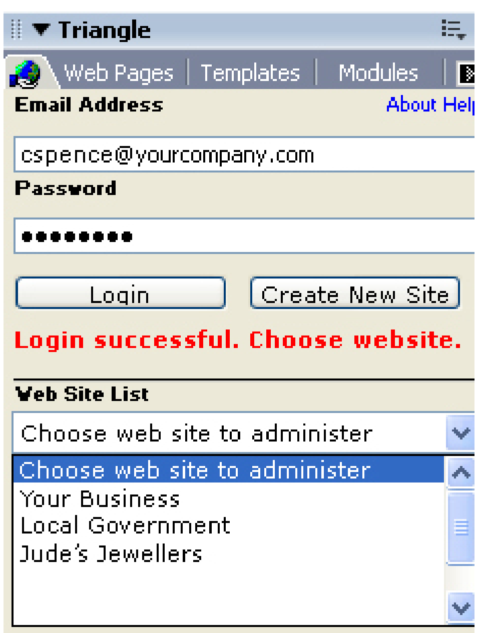
18.1. *Installing Triangle*

Installing Triangle is very simple and quick. After downloading Triangle simply click on the file and it will automatically install itself. Please ensure you have Macromedia's Extension Manager installed on your computer (comes with Dreamweaver). Please also ensure you meet the minimum system requirement. Triangle works for both Windows and Macintosh based computers.

After you have installed Triangle, access it inside Dreamweaver from the **Window menu** and choose **Triangle**.

18.2. *Working with Triangle*

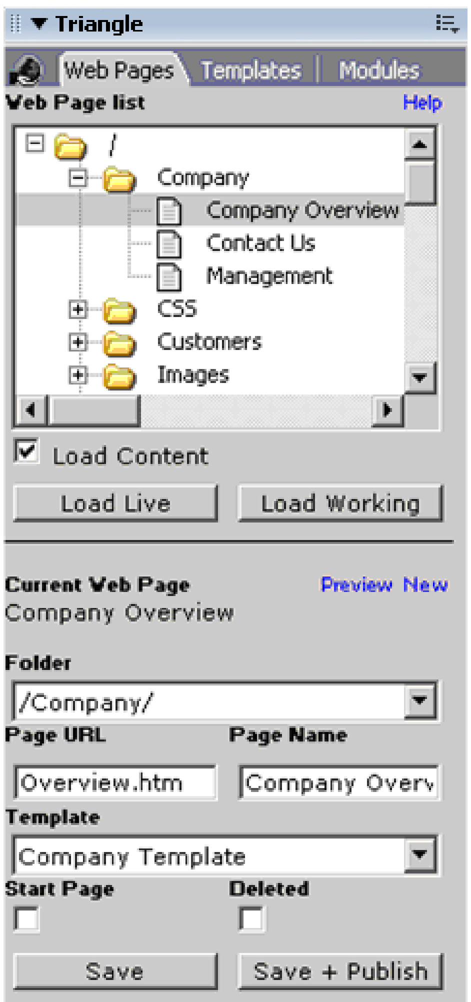
Triangle enables you to login and load any of your websites inside Dreamweaver. As you can have more than one website you can use the same username and password to selectively login to each one.



18.3. Web Pages and Templates

Triangle enables you to instantly download any web pages or templates from your website, edit in Dreamweaver and save back to the server. Key features for Web Pages and Templates are:

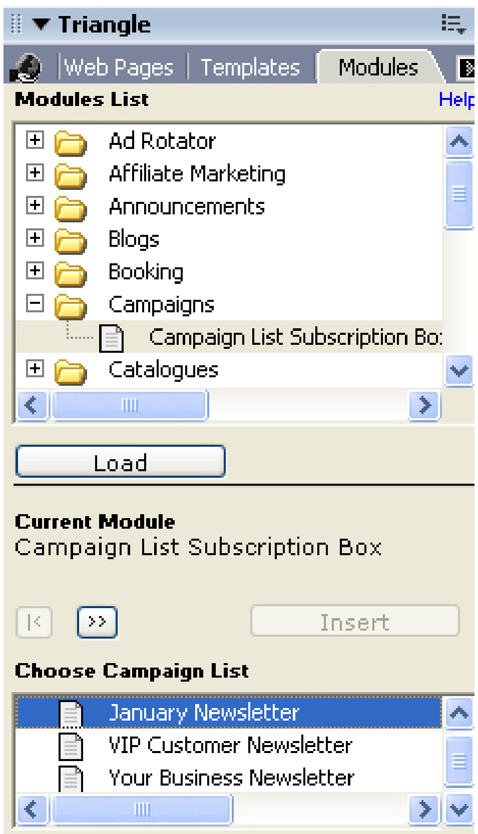
- Create working version of web pages and templates
- Publish web pages and templates
- View archived history of web pages and templates
- Rollback to a previous version of web pages and templates
- Create new web pages and templates
- Preview working or live copy of web page
- And more



18.4. Modules

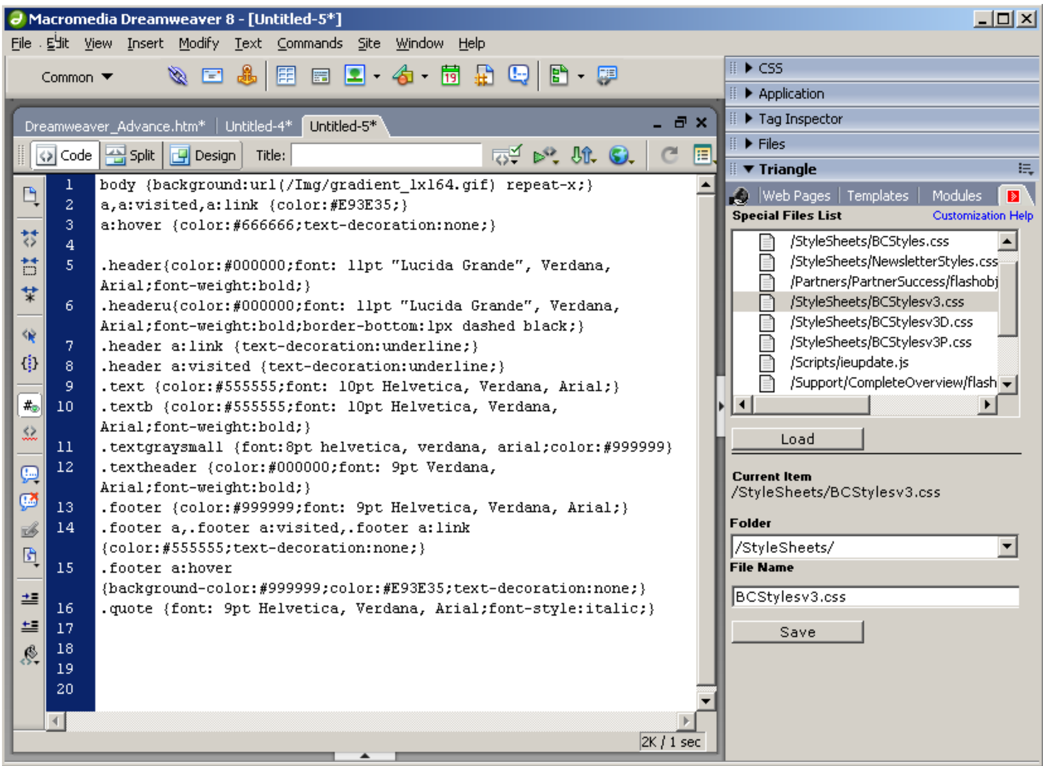
Modules enhance the functionality of web sites significantly. They enable you to create highly rich and functional websites quickly and effortlessly. You no longer need to spend your time programming nor be proficient in programming. The time consuming, costly and complex nature of creating highly functional websites has now been streamlined and is available to you using a click and point approach.

There are a vast number of modules available so that you can create functional web pages and templates. Some module types are ready for you to insert into a web page. For other module types you need to first create them using the web-based administration before you can add them to your web pages. For instance if you want to add a new navigational menu to your website, you would create it first using the web-based administration interface and then add it to a web page inside Dreamweaver. This applied for most module types such as Email Newsletter Campaigns, Web Forms, Photo Galleries and so forth.



18.5. Advanced Tab

This tab has two main functions. It provides you with the ability to **customize content, system message and outbound emails**. It also allows you to quickly **retrieve any Style Sheet (.css) or Javascript (.js) file** from your website, edit it and save it back. As these file types are often used when creating or updating websites, using Triangle to work with them is much faster than using FTP.



19. AD ROTATORS

Ad Rotators are a great way to keep your site fresh. Ad Rotators allow you to randomly display an image, Flash or snippet of HTML in any part of a web page. Every time a customer visits the web page with an Ad Rotator a different item from your Ad Rotator group will be displayed.

For example you can use Ad Rotators for:

- Product Specials
- Customer testimonials
- Special announcements
- And so forth

19.1. Creating an Ad Rotator

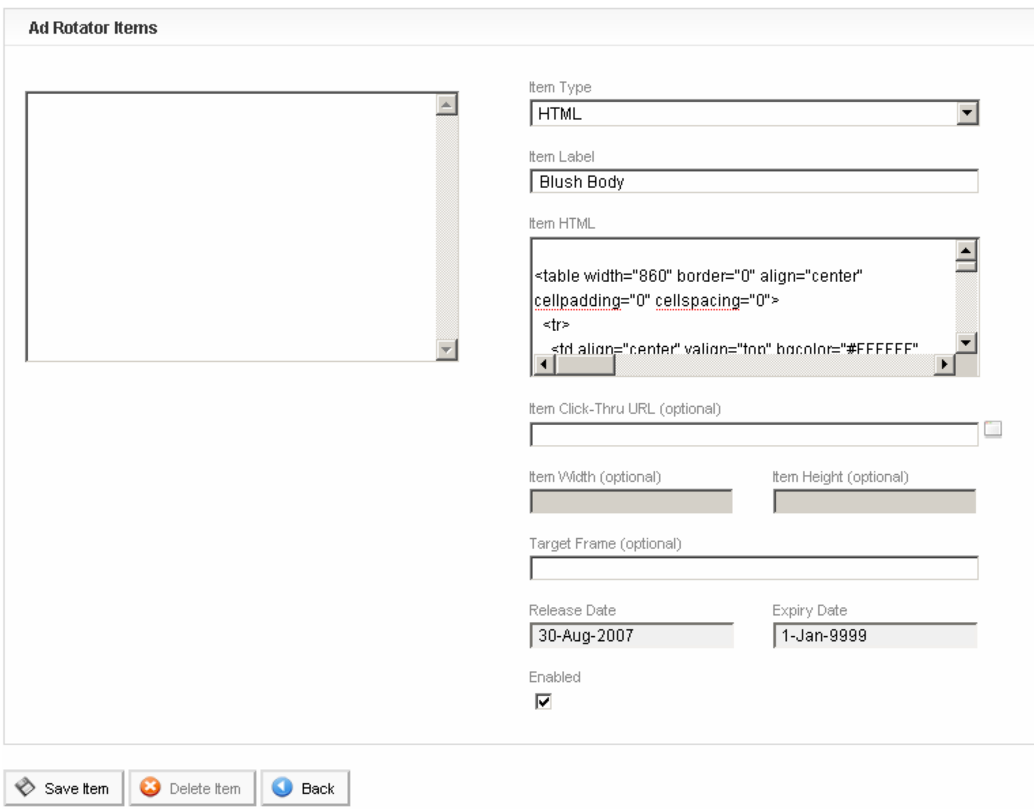
To create an Ad Rotator go to **Modules -> Add Rotators** and select **Create a new Ad Rotator**. Provide a name for your Ad Rotator and select **Save**. You are now ready to add items to your Ad Rotator.

19.2. Adding Items to your Ad Rotator

Your Ad Rotator group can contain as many items as you wish. It may consist of only images, Flash, HTML or a combination of any. Click on the **Ad Rotator Items** link to get started. Choose the item type, enter its details and select **Save**. Each item can have a **Release** and **Expiry** date which allow to control when the item is available and when it is not.

By providing a **Click-Thru URL** for any item you enable customers to click on that item. In addition the system measure the number of clicks an item has received which enable you to gauge the effectiveness of that item.

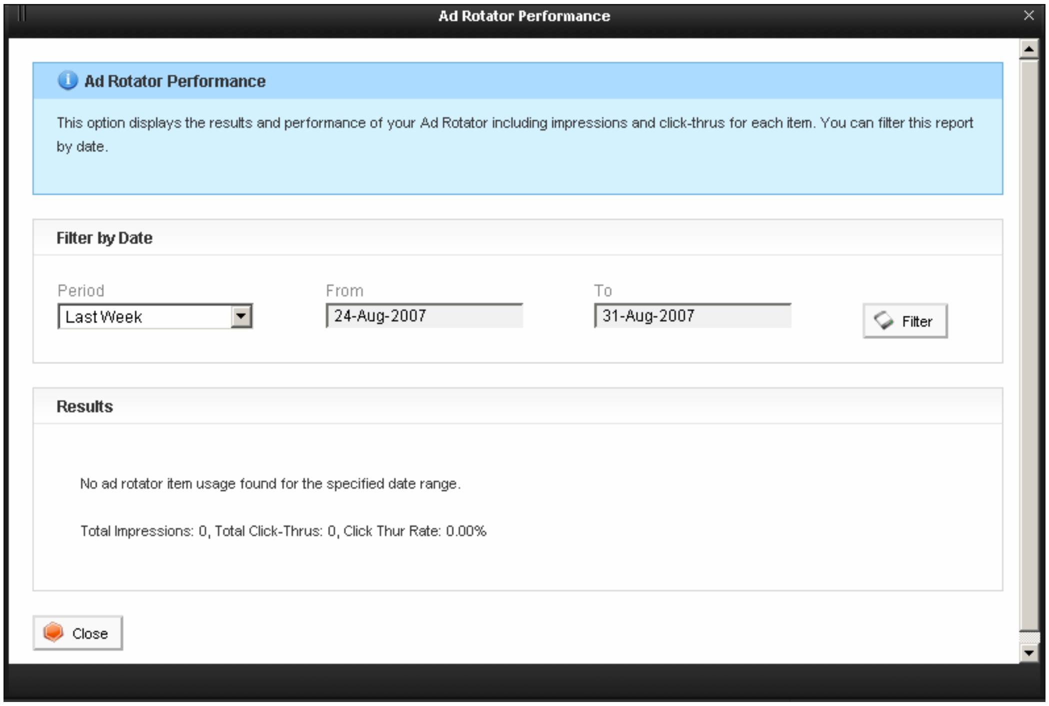
To add your Ad-Rotator to any web page simply use the **1-Click Insert** tab. You can also use the Module Manager or Triangle to add your Ad Rotator to a web page.



19.3. Ad Rotator Reporting

You can measure the performance of your Ad Rotators and the items within them. For every item the system tracks the number of **Impressions** and **Click-Thrus** that item has received. The effective Click-Thru rate of an item is the number of clicks an item has received divided by the total number of impressions for that item.

To view the performance of your Ad Rotator click on the **Reports and Performance** link.



20. PHOTO GALLERIES

The Photo Galleries feature enables you to present any set of your images on your website so customers can easily navigate through and view them. The Photo Galleries feature is extremely easy to use and can be implemented on any web page with just a few clicks of the mouse. It automatically generates thumbnails for every image in the set and allows customers to navigate from one to another. You can optionally provide a description for each photo which is displayed when the user views the full size image.

20.1. Create a Photo Gallery

Creating your own photo gallery is extremely easy. There are 3 key steps to this:

1. Create a folder via the File Manager or FTP and upload all your photos. You don't need to create thumbnails as the system will automatically do this for you.
2. Go to **Modules -> Photo Galleries** and select **Create a new Photo Gallery** to create a Photo Gallery.

You can optionally provide a description for every photo in your image set. To do so go to the **Manage items and descriptions** link. Note: Descriptions are only displayed when the full image is being shown and not whilst display the list of images.

3. Use **Add Photo Gallery to a web page** link to add the module for this Photo Gallery to any web page. You can also use the Module Manager or Triangle to add your Photo Gallery to any web page.

That's all it takes to create a photo gallery. Now view your web page in your browser to see your photo gallery in action!

20.2. Customizing your Photo Gallery

By default the Photo Gallery module looks like:

{module_photogallery, id}

This module takes in further parameters that allow you to customize it further:

{module_photogallery, id, rowLength, targetFrame, resultsPerPage, Width, Height}

Id – System generated ID (do not change)
rowLength – Number of photos per row

targetFrame – e.g. _blank. Specify the frame you want the photos to open in

resultsPerPage– Number of photos per page

Width/Height – The max width and height for thumbnail imags. The default is 80 pixels.

E.g.

Here is an example to display 4 photos per line and a maximum of 12 photos per page. The thumbnail size has also been set to 120x120 pixels.

{module_photogallery, id, 4, , 12, 120, 120}

Note: If an image is 640 pixels wide x 400 pixels high and you set the thumbnail size to 120 x 120 pixels the thumbnail image will have a maximum width of 120 and a smaller height. Proportions are respected when creating the thumbnail image. Alternatively if the image dimensions are 400 pixels wide x 640 pixels high then the height will be 120 pixels and the width smaller. The thumbnail size dictates the maximum width or the maximum height of the image.

21. Affiliate Programs

Affiliate Marketing is a method of promoting web businesses in which an affiliate is rewarded for every visitor, subscriber, customer, and/or sale provided through his/her efforts. Compensation or commission may be made based on a certain value for each exposure (CPM), visit (Pay per click), registrant or new customer (Pay per lead), sale (usually a percentage, Pay per sale or revenue share), or any combination of them.

Merchants like affiliate marketing because it is a "pay for performance model", meaning the merchant does not incur a marketing expense unless results are realized. Some businesses owe much of their growth and success to this marketing technique, especially small and midsize businesses. However, unlike display advertising, affiliate marketing is not easily scalable.

This system comes with its own Affiliate Marketing engine which enables you to create one or more programs that reward affiliates differently but fundamentally designed to drive qualified leads to your website.

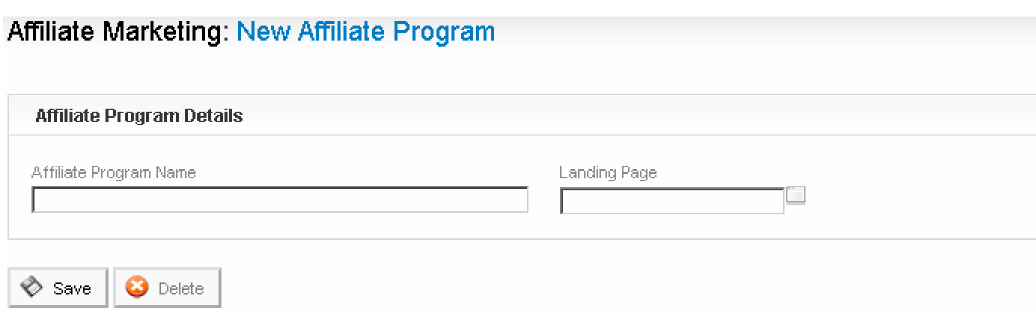
To take advantage of Affiliate Programs and use them to drive leads to your website, you would:

1. Create an Affiliate Program
2. Add one or more affiliates to your Affiliate Program via the integrated customer database
3. Give each affiliate their own unique tracking link for this Affiliate Program so they can place this on their website or in their email marketing campaigns
4. Run regular reports to see how each affiliate is tracking and reward them accordingly

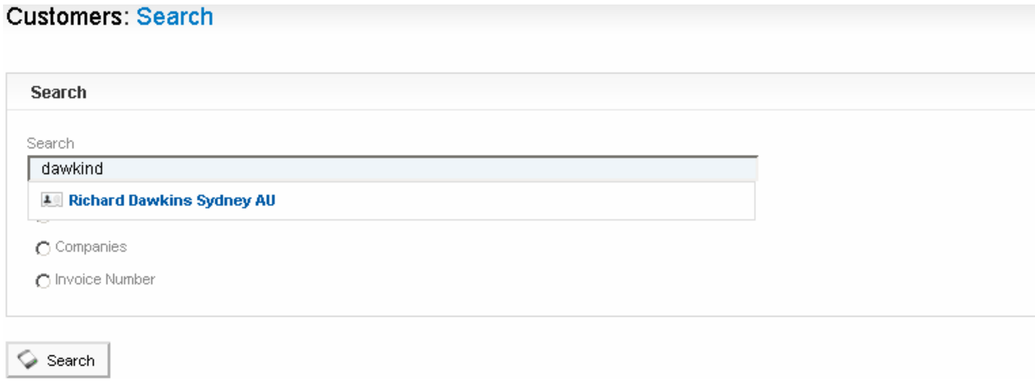
21.1. Creating an Affiliate Program

Creating an Affiliate Programs is extremely easy and takes no more than a few minutes.

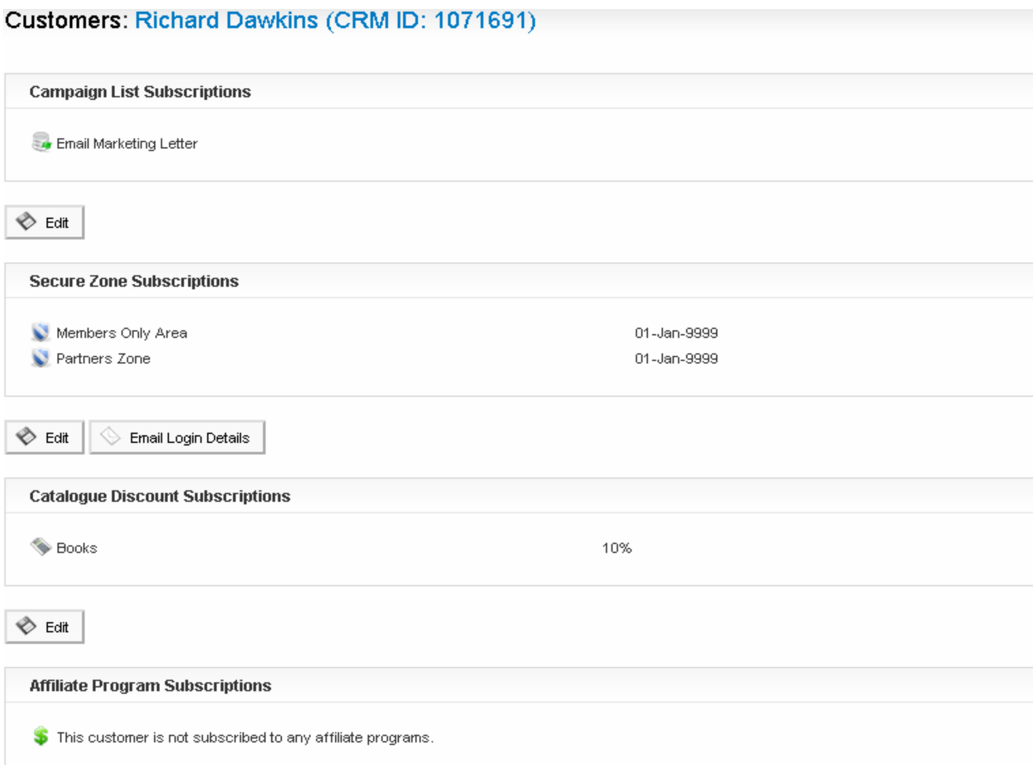
Simply give your program a name, e.g. **Mum’s at Home**. You must also select the landing web page for your program. When a referral is made the referee is taken to this landing page first. You can customize this web page so it is in context to your Affiliate Program.



Now you have to subscribe affiliates to your program. Affiliates are those who will refer leads to your customers. Go to your customer database and locate your affiliates.



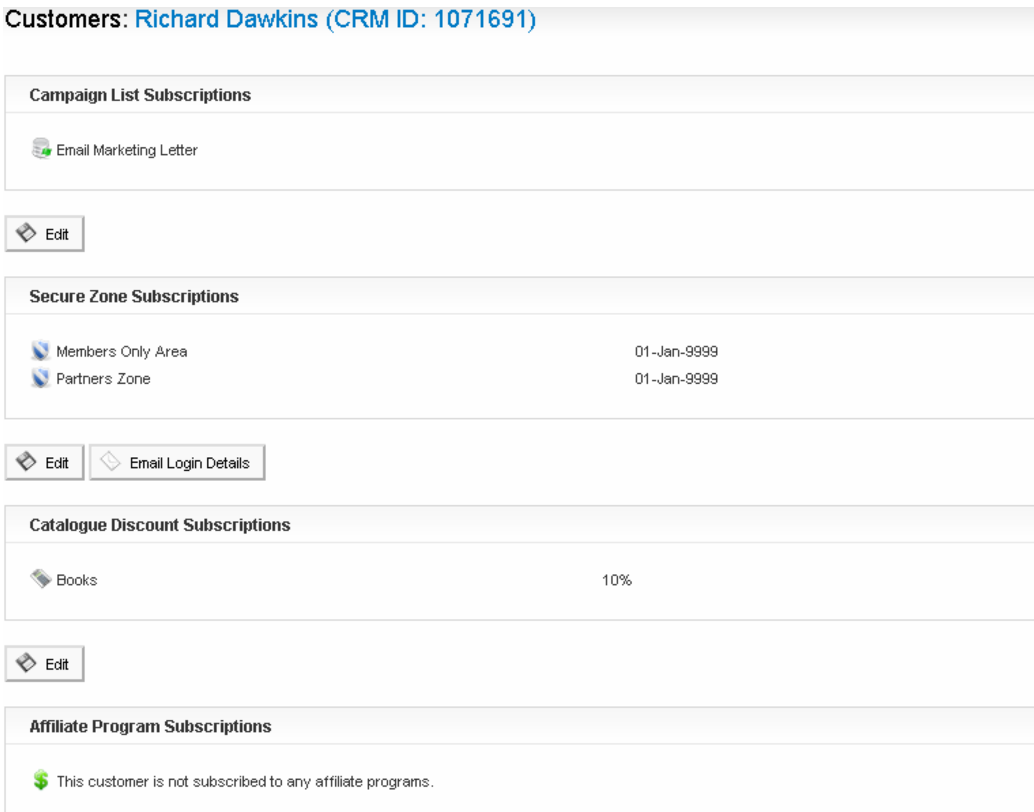
Go to **Subscriptions** tab and subscribe contact to Affiliate Program.



21.2. Unique Affiliate Link

It's important to note that every affiliate has a unique tracking URL for every Affiliate Program that they participate in. The unique tracking URL enables the system to track the number of referrals made by every affiliate, when these referrals are being made and the conversions that are taking place as a result of these referrals.

To send this tracking URL to an affiliate simply click on the **View Info** link in the Subscription tab of a customer's record.



21.3. Rewarding Affiliates

The ultimate goal of an Affiliate Program is so every person that is referred eventually becomes a customer. Hence it is imperative that leads that are referred by an affiliate are tracked closely in order to identify whether a lead eventually becomes a customer.

How you reward affiliates is ultimately up to you. You can reward them for simply referring leads to your website or you can only reward them if these leads take a specific action as listed below. Or another popular form of compensation is the based on how much money the referred lead spends on your website.

For any lead referred the system will track the following actions:

- Make an Enquiry via a Web Form
- Subscribe to a Newsletter
- Purchase Products via the Online Shop
- Request-a-Quote via the Online Shop
- Make a Booking to an Event

Using the **Results** tab in Affiliate Programs feature you can run reports to see all referrals and conversions for your program. You can also filter to see referrals for a date range or how a particular affiliate is performing.

22. META DATA

What are meta tags? They are information inserted into the "head" area of your web pages. Other than the `title tag`, information in the head area of your web pages is not seen by those viewing your pages in browsers. Instead, meta information in this area is used to communicate information that a human visitor may not be concerned with. Meta tags, for example, can tell a browser what "character set" to use or whether a web page has self-rated itself in terms of adult content.

It's important to note that using meta tags was popular in the Web 1.0 era but in recent times the value put on Meta Data by the search engines has diminished quite considerably. It's recommended that customers focus on many of today's SEO techniques rather than meta data.

There are two ways to add meta data to your web pages when using this system.

1. Simply add your own meta tags to any web pages either manually or using the online WYSIWYG editor or an offline editor such as Dreamweaver. The system will respect these tags and they will remain intact in your web pages
2. You can use the Meta Data framework built into this system.

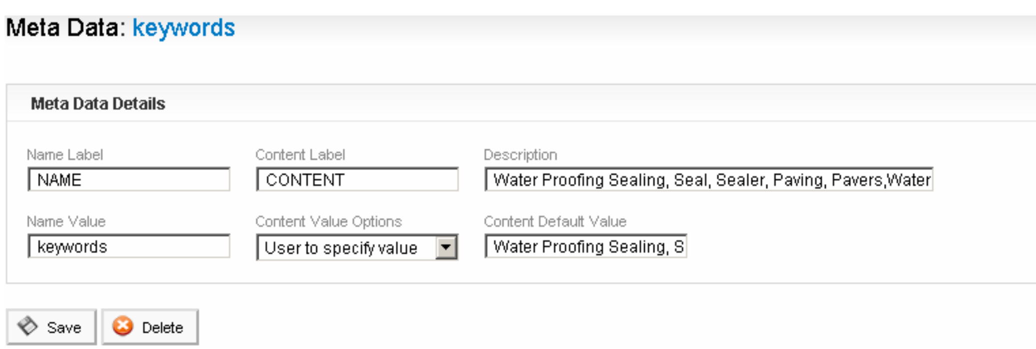
22.1. *Creating Meta Data Tags*

Before you can apply meta tags to your web pages you have to first create the tags in **Admin -> Manage Meta Data**. Once you have done this then you can selectively choose the web pages that you wish to add these tags to. At that time you can also specify the value that each tag should have for any given web page.

Most widely used meta tags are:

- Description
- Keywords
- Robots

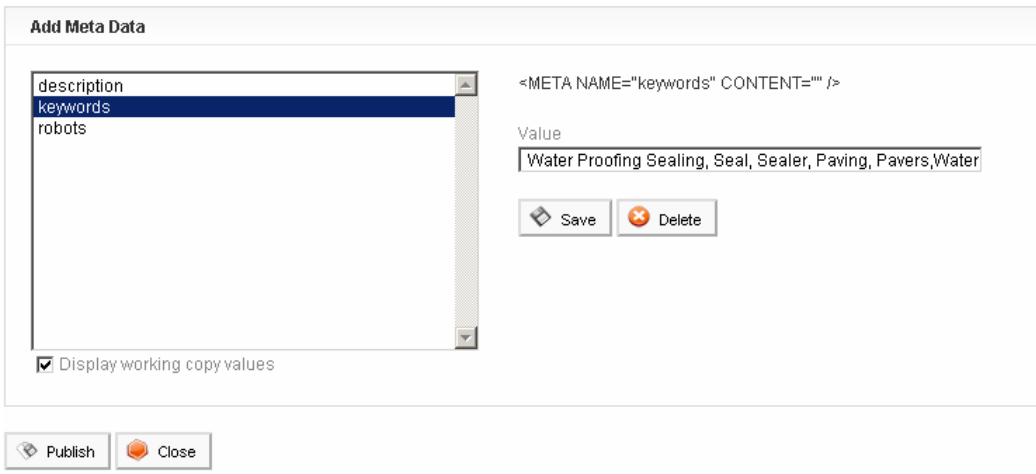
These should already be created for you; otherwise you can create them yourself. You can just as easily add other tags that may apply to your business.



22.2. *Adding Meta Data tags to Web Pages*

Once you have created all your tags you are ready to add them to any web page. To do so:

1. Go to **Website -> Web Pages** and choose a web page
2. Choose the **Add meta data to Web Page** link
3. Now you will see a list of available tags



4. Click on a tag from the left-hand box to load it. Simply enter a value for the tag and click Save.

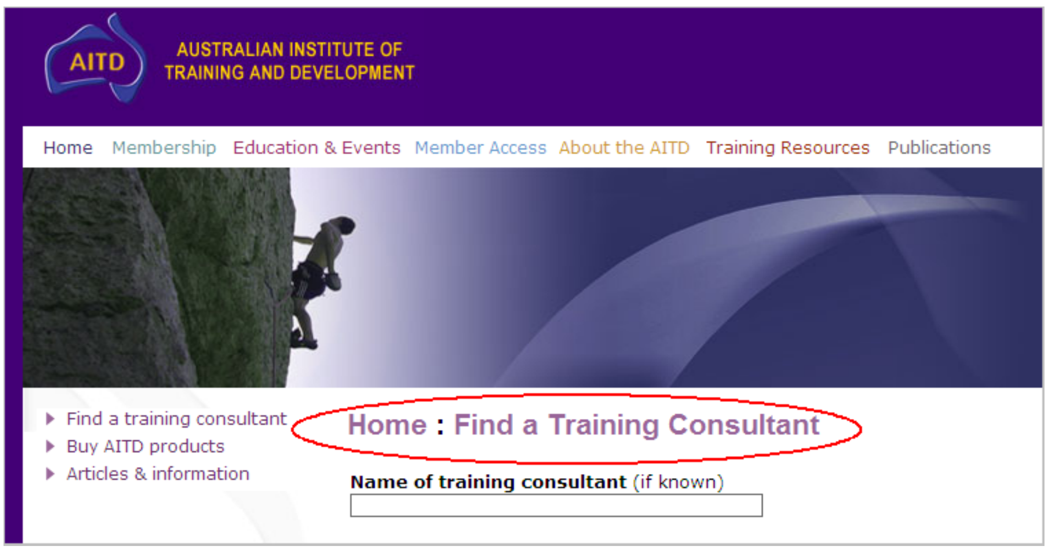
This is how easy it is to attach meta data tags to your web pages. Now if you view your web page in a web browser and view its source you will see this tag in the HEAD of your web page.

23. SITEMAPS

The sitemaps feature is used for two of the modules in the system. These modules are the **sitemaps creation module** and the **breadcrumbs** modules.

Websites are generally made up of many web pages. These web pages reside either at a root level in your website and within subfolders. However the true hierarchy of web pages, which is how customers *logically* traverse from one web page to another, does not generally correlate with your website folder structure. As such it is important to manually organize your web pages into their true *customer-focused* hierarchy to take advantage of these common and highly useful modules for your website.

23.1. Breadcrumbs Module



The breadcrumbs module is an extremely useful module that should be utilized by almost every website. When you use the sitemaps feature to manually organize web pages into their proper hierarchy you can then take advantage of this module. In addition if you are also taking advantage of the templates feature within the system, by placing the { module_breadcrumbs } on your template you effectively add this functionality to every single web page using this template.

The key benefits of the breadcrumbs module are:

- Breadcrumbs are a fantastic way for customers to see where they are on your website at any given time
- The system will automatically draw the breadcrumbs for every web page where this module appears. This will allow the customer to traverse backwards if they wish.
- If you change your web page hierarchy then the breadcrumbs module will automatically update to take on your new hierarchy

23.2. *Sitemaps Module*

Sitemaps are useful as they allow customers to have a full view of all web pages within your website and their hierarchy. This in turn allows customers to easily find what they are looking for on your website. Generally a link to a web page that contains your sitemap should be included on your home page or even in the footer of every web page.

After you manually organize your web page using the sitemaps feature, you can then add a sitemap to your website using the Module Manager or Triangle.

Typical sitemap

- Home
  - Member Access
    - Articles & Information
    - Job Notices
      - Submit Job Notice
    - Discounted Services
      - Business Services
      - Training Tools
      - Books & Publications
  - Membership
    - How to Join
    - Types of Membership
    - Join the AITD Now
    - Why Join the AITD?
  - About the AITD
    - Contacts
    - Board Members
    - Councils
    - AITD Background
    - Constitution
  - Training Resources
    - Buy AITD Products
      - Disks
      - Event Products
    - Articles & Information

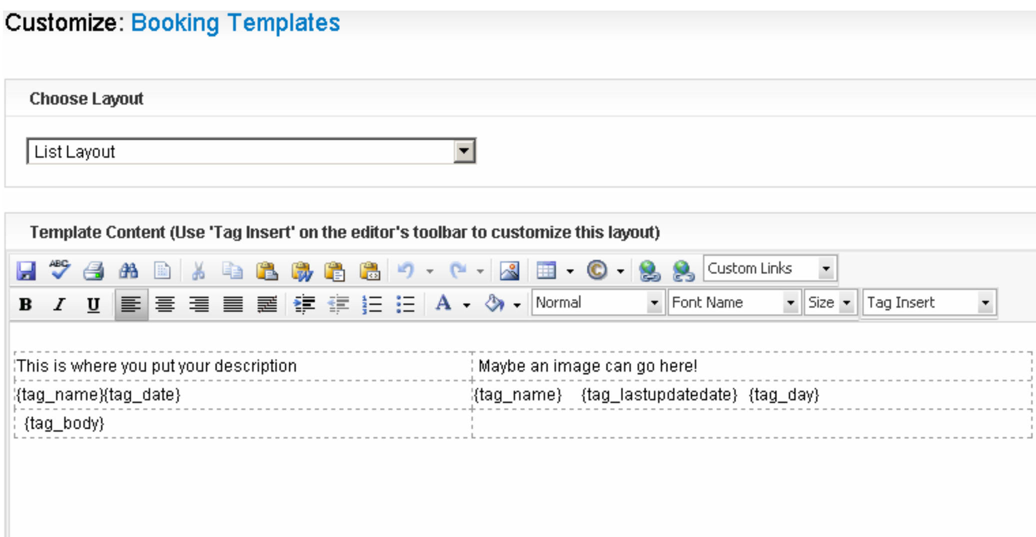
24. CUSTOMIZING YOUR ONLINE BUSINESS

The premise behind this system is that you can customize just about everything and anything that appears on your website. The granular customizability power of this system is ideal for designers who want be able to have control over every element of content.

You can either use the web-based Administration interface or Triangle to customize any of these templates.

24.1. Customizing Content

The appearance of every content type can be controlled and customized. The system uses tags as placeholders for small amounts of information. These tags enable designers to utilize the latest web standards to wrap these tags and customize the look and feel of any type of content.



How to customize each content type is discussed separately in the relevant section for that content.

24.2. System Messages

System Messages are messages displayed based on a particular event. The most common system message is a “404 Page Not Found” displayed when a request for a web page fails as the page does not exist. There are also a number of other system messages. For example another system message is the confirmation shown after a visitor submits a web form or subscribes to an email newsletter campaign.

All system messages are fully customizable. They can use a site-level template to ensure a consistent look and feel when they are displayed. These system messages are already customized so you can use them straight way but if you wish to customize them you can access them via: **Administration->Customize->System Messages** or in Dreamweaver via Triangle.

Here’s a list of some of the system messages. For the complete list please refer to the system.

- Page Content Empty
- No Start Page
- Secure Zone Access Expired
- Secure Zone Access Denied
- Secure Zone Log Out Page
- Refer-A-Friend Confirmation Page
- Password Retrieve
- 401 Unauthorized Access
- 404 Page Not Found
- Favorites Authentication Page
- Favorites Confirmation Page
- Rating Confirmation Page
- Newsletter Subscription Page
- Newsletter Unsubscribe Page
- Booking Confirmation Page
- Booking Verification Page
- Web Forms Confirmation Page
- Task Snooze Confirmation Page
- Update Details Form Confirmation Page
- Web App Item Confirmation Page

In fact in some cases you can configure the system to skip system messages and display a specific web page instead.

24.3. Outbound Emails

All emails sent out from the system to your customers may be completely customized by you. Keep in mind system messages sent to you and other administrators of the system cannot be customized.

Outbound emails are customized in similar fashion to other types of content. Tags are provided for each email that can be used to place relevant information in various parts of the email.

You can also customize:

- The form name and email address from which these are sent from
- The subject of the email
- The format of the email, e.g. HTML or Text
- Site-level Template to use – to ensure a consistent look and feel

Here's a list of some of the outbound emails. For the complete list please refer to the system.

- Double Opt-In Email
- Password Retrieve Email
- Invoice
- Overdue Invoice
- Quote
- 3rd Party Workflow Emails
- Forums Subscriber Alert
- Secure Zone Login Details

25. Appendix

25.1. Modules Quick Guide

Module	Feature	Notes
{ module_adrotator,id }	Ad Rotators	Chapter 11. Module does not take any extended parameters.
{ module_announcements, type, id }	Announcements	Chapter 17. Module does take extended parameters.
{ module_blog, type, id }	Blogs	Chapter 11.3. Module does not take any extended parameters. Recommended use is to link directly to an individual blog rather than use the blog module. Use the Link Manager for Blog URL.
{ module_blogsitepost, x }	Blogs	Displays the last X blog entries across all blogs on a web page. Default number is 10, if X is omitted
{ module_booking, type, id }	Bookings	Chapter 13. Module does not take any extended parameters.
Campaign List Subscription Form	Campaigns/Lists	Chapter 9. Customize form after inserting it into a web page or template
{ module_catalogue,id }	Catalogues & Products	Chapter 10. Displays an individual catalogue on a web page. Recommended use is to link directly to an individual catalogue rather than use the blog module. Use the Link Manager for Catalogue URL.
{ module_product, id1, id2 }	Catalogues & Products	Chapter 10. Displays an individual product from a given catalogue on a web page.
Product Search Form	Catalogues & Products	Chapter 10. Module does take extended parameters. Customize form after inserting it into a web page or template.
{ module_productresults }	Catalogues & Products	Chapter 10. Module does take extended parameters. Displays the results of a product search. Can be

		placed on the same page as the search form or a different page.
{ module_shoppingcartsummary }	Catalogues & Products	Chapter 10. Module does take extended parameters. Displays the summary of the cart on the current catalogue page or web page.
{ module_ratingrank }	Comments	Chapter 11.5. Displays the current rank of an item represented in stars. Any item can be rated e.g. web pages, products, FAQs and so forth.
{ module_ ratingfeedback}	Comments	Chapter 11.5. Displays all approved comments for an item. Refer Chapter 24 to customize the output of this module.
Comments Form	Comments	Chapter 11.5. Customize form after inserting it into a web page or template.
{ module_menu, id }	Dynamic Menus	Chapter 15. Module does not take any extended parameters.
{ module_faq, type, id }	FAQs	Chapter 17. Module does take extended parameters.
FAQ Search Form	FAQs	Chapter 17. Customize form after inserting it into a web page or template.
{ module_ faqresults }	FAQs	Chapter 17. Module does take extended parameters. Displays the results of a product search. Can be placed on the same page as the search form or a different page.
{ module_forums, type, id }	Forums	Chapter 11.2. Module does not take any extended parameters.
{ module_closewindow }	General	Link to close current window
{ module_visitorcountrycode }	General	Outputs 2-letter country code, e.g. US, AU for the current website visitors
{ module_siteurl }	General	Outputs current site URL. Append http:// if required.
{ module_today }	General	Outputs today's date in the following format: November 23, 2005
{ module_goback }	General	Link to go back one page
{ module_literature, type, id }	Literature	Chapter 17. Module does take extended parameters.

{ module_photogallery,id }	Photo Galleries	Chapter 20. Module does take extended parameters.
Report Search Form	Reports	Enables customers to run custom reports in Secure Zones. Contact Support for details. Customize form after inserting it into a web page or template.
{ module_reportname }	Reports	Displays the name of report for which results have been generated
{ module_reportresults }	Reports	Displays the results of the report on a web page. Module does not take any extended parameters.
RSS Channel Link	RSS Channels	Image to subscribe to an RSS channel. Customize link after inserting it into a web page or template.
Website Search Form	Search Engines	Chapter 14. Allows customers to search through all content on a web site. Customize form after inserting it into a web page or template.
{ module_searchresults }	Search Engines	Chapter 14. Module does not take any extended parameters.
Case Search Form	Secure Zones/Cases	Chapter 8.3. Allows customers to search through their cases and see a list of them on a web page inside a Secure Zone. Customize form after inserting it into a web page or template.
{ module_caseresults }	Secure Zones/Cases	Chapter 8.3. Module does not take any extended parameters.
{ module_case, type, id }	Secure Zones/Cases	Chapter 8.3. Module does not take any extended parameters.
{ module_company }	Secure Zones / Contacts & Companies	Chapter 16.3. Displays the current company name attached to a contact record. Can be used to pre-populate company field in a web form.
{ module_firstname }	Secure Zones / Contacts & Companies	Chapter 16.3. Displays the first name of the current customer logged in to a Secure Zone. Can be used to pre-populate first name field in a web form.
{ module_lastname }	Secure Zones /	Chapter 16.3. Displays the

	Contacts & Companies	last name of the current customer logged in to a Secure Zone. Can be used to pre-populate last name field in a web form.
{ module_fullname }	Secure Zones / Contacts & Companies	Chapter 16.3. Displays the full name of the current customer logged in to a Secure Zone.
{ module_emailaddress }	Secure Zones / Contacts & Companies	Chapter 16.3. Displays the email address of the current customer logged in to a Secure Zone. Can be used to pre-populate email address field in a web form.
{ module_whosloggedin }	Secure Zones	Chapter 11.1. Module does take extended parameters. Displays the name of the current person logged in to a Secure Zone.
{ module_logout }	Secure Zones	Refer 11. Link to log out of a Secure Zone.
{ module_favorites, id1, [id2] }	Secure Zones	Displays a customer's favorite's list for a particular content type.
Lost Password Form	Secure Zones	Chapter 11. Allows customers to retrieve their lost password. Customize form after inserting it into a web page or template.
Secure Zone Login Form	Secure Zones	Chapter 11. Allows customers to login to pre-designated Secure Zone. Customize form after inserting it into a web page or template.
Update Details Form	Secure Zones / Contacts & Companies	Chapter 16.3. Allows customers to securely update their personal details using this form. Customize form after inserting it into a web page or template.
{ module_webapps, id, type, itemId }	Web Apps	Chapter 12.5. Module does take extended parameters.
Web App Customer Input Form	Web Apps	Chapter 12.5. Customize form after inserting it into a web page or template.
Web Apps Search Box	Web Apps	Chapter 12.5. Instantly provides advanced search functionality for any Web App. Customize form after inserting it into a web page or template.

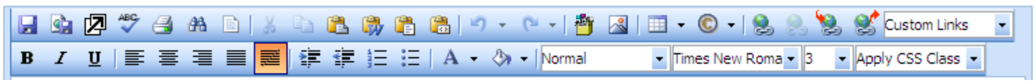
{ module_webappsresults }	Web Apps	Chapter 12.5. Module does take extended parameters.
Refer-a-Friend	Web Form	Stand-alone Refer-a-Friend functionality. Customize form after inserting it into a web page or template.
Web Forms	Web Forms	Chapter 16. Customize form after inserting it into a web page or template.
Back to Home Link	Web Pages	Link to go back to the home page. Customize link after inserting it into a web page or template.
{ module_breadcrumbs }	Web Pages	Chapter 23.1. Module does not take any extended parameters.
{ module_lastupdatedate }	Web Pages	Displays the last update date of a web page. If web page is using a template, last update date of template is never used only that of a web page.
Printer View Link	Web Pages	Link to display the current web page using the Printer Friendly template. Customize link after inserting it into a web page or template.
Sitemap	Web Pages	Chapter 23.2. Inserts the current sitemap onto a web page. Customize sitemap after inserting it into a web page.
{ module_pagename }	Web Pages	Displays the name of the current web page. Add to any web page or template.

25.2. WYSIWYG Editor

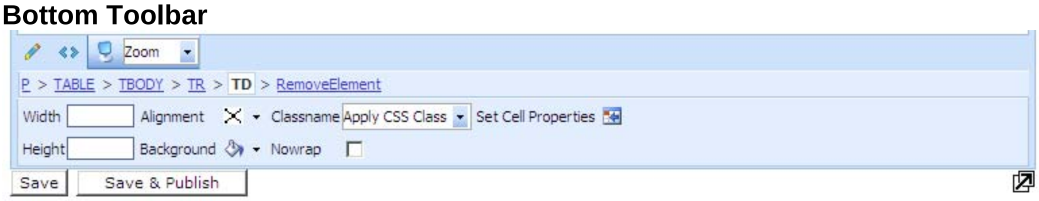
The WYISWYG (what-you-see-is-what-you-get) editor is used throughout this application. It's an online editor that enables you to edit web pages and other types of content without. You are able to add formatting, images and business functionality using a simple point-n-click approach.

Below is a an explanation of the editor's icons. Please note that depending on where you use the editor some icons may or may not be visible.

Top Toolbar



Bottom Toolbar



	Saves the current item. If working with a web page or templates then this button will save a **Working Copy**. Changes will not be publicly visible until the web page/template is published.
	Save and Publish. Saves the current page and makes all the changes **Live**, i.e. publicly visible.
	Preview the item in a new browser window
	Spell check current item
	Print current item
	Find/Replace
	Paste
	Cut
	Copy
	Paste
	Paste from Microsoft Word. If you are copying from Microsoft Word use this option where the editor will not try and remove unwanted MS Word specific characters. In general copying from MS Word is considered bad practice.
	Paste as Plain Text. All HTML characters are moved when the content is pasted.
	Paste as HTML
	Undo
	Redo
	Module Manager. The Module Manager allows you to add powerful business functionality to your content using a point-

	n-click approach without any programming.
	Ability to add tags to your content.
	Image Manager. Upload and add images to your content.
	Table Manager Wizard
	Insert Symbol
	Hyperlink Manager. The hyperlink manager allows you to create hyperlinks, mailto: links and anchors. You can easily create links to any content within your site including web pages, announcements, FAQs, literature, web app items, catalogues, blogs, forums and more.
	Remove Hyperlink. Select any link and click this button to remove the hyperlink from it.
	Hyperlink Inbound Checker (web pages only). Validates all links in the current web page to see if they point to a valid location.
	Hyperlink Outbound Checker (web pages only). Validates all links from all other web pages in your site to this web page.
Custom Links	List of all web pages in your site. Highlight any text and select a web page to instantly create a link to it.
	Bold
	Italics
	Underline
	Justify Left
	Centre Justify
	Right Justify
	Full Justify
	No Justify
	Left Indent
	Right Indent
	Numbering
	Bullets
	Choose Foreground Color for your text
	Choose Background Color for your text
Normal	Paragraph Style
Times New Roma 3	Font Name and Size
Apply CSS Class	List of Available CSS classes that you can apply to your content. If content uses a template then this list will be populated with any CSS classes found in your template.
	Design View
	HTML Source View
	Full Screen Mode (F11)
Zoom	Zoom
1-Click Insert	1-Click Insert. Ability to add powerful business functionality to your content using 1-Click.
Tag Insert	Ability to add tags to your content.

25.3. Web Services

This system comes with an extensive web services framework. This framework exposes many of the content and customer related functions found in the application. For example Triangle utilizes this web services framework to communicate in real-time with your website. If you are interested in learning more and building custom applications on top of this framework please contact the support team.

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